

Customers

Accounts receivable > Common > Customers > All customers

Summary Accounts receivable balances are maintained in Customer accounts.

Steps 1. Create a new Customer

Tips • Add important fields to the Create new customer form

Create a new Customer

- Click the new **Customer** button.
- Fill in **Customer account** or default from a [Number sequence](#).
- Add the **Name**.
- Select the **Customer group**.
- Add the **Address and contact information**.
- Click **Save and open > Customer**.

Customer (1 - ceu) - New Record

Create new customer

Customer account: 1000

Record type: Organization

Name: Pear, Inc.

Details

Customer group: 10 Mode of delivery:

Currency: USD Sales tax group:

Terms of payment: N060 Tax exempt number:

Delivery terms:

Address and contact information

Country/region: USA Phone: 800-555-Pear

ZIP/postal code: 95014 Extension:

Street: 1 Pear Way Fax:

E-mail address:

City: Cupertino

State: CA

County: SANTA CLAR

Save and close Save and open > Cancel

Interactive 3.1 Customers

Customers (1 - ceu) - Customer account: 1000, Pear, Inc., Customer account: 1000

File Customer Sell Invoice Collect Projects Service Market General

Edit Delete Customer Contacts Transactions Balance Forecast Bank accounts Summary update Credit cards Generate from template Attachments

1000 : Pear, Inc. Edit

General 10

Change name Change party association

Customer

Account: 1000
Record type: Organization
Name: Pear, Inc.
Search name: Pear, Inc.
Customer group: 10
Classification group:

Organization details

Number of employees: 0
Organization number:
ABC code: None
DUNS number:

Other information

Address books:
Language: en-us

Primary address
1 Pear Way
Cupertino, CA 95014
USA

Recent activity
Relationships
Statistics
Contacts
Recurring invoice templ...
Related information

Show more fields

Addresses
Contact information
Miscellaneous details
Sales demographics
Credit and collections
Invoice and delivery
Sales order defaults
Payment defaults
Financial dimensions

Credit and collections
Invoice and delivery
Payment defaults
Financial dimensions

Always
No No 0.00
N060

The customer account number

USD ceu Close



1

2

3

4

5



Movie 3.1 Customers

Customer (1 - ceu) - New Record

Create new customer

Customer account: 1002

Record type: Organization

Name: Pear, Inc.

Details

Customer group: 10 Mode of delivery:

Currency: USD Sales tax group:

Terms of payment: N090 Tax exempt number:

Delivery terms:

Address and contact information

Country/region: USA Phone:

ZIP/postal code: 95014 Extension:

Street: 1 Pear Way Fax:

E-mail address:

City: Cupertino

State: CA

County: SANTA CLAR

Save and close Save and open

Customer
Sales quotation
Project quotation
Sales order

902303 : Acclaimed
Customer group:
Credit limit: 0.00 Method of payment:
Delivery terms: PCK Payment schedule:
Sales tax group: WA Modified date and time: 9/7/2011 09:59:29 am
Cash discount: Modified by: jalger

Navigation pane Favorites
All customers
Name
Acclaimed Dog Service
Banana Conference C
Basketball Stadium
Birch Company
Black Curve Airport (U
Cave Wholesales
Cheetah Concert Hall
Consolidated Messen
Contoso Europe
Contoso Retail Boston
Contoso Retail Chicag
Contoso Retail Dallas
Contoso Retail Denve
Contoso Retail Detroi
Contoso Retail Los Ar
Contoso Retail Miami

File Customer Edit in Edit Delete
New Maintain

CEU

0 (0) USD ceu