

Customer Maintenance

Customer Maintenance is the module you will use to look up customer account, find history, invoices, open orders, quotes, and any specific notes on their account. This is also where you will set up new customer accounts. You can get to Customer Maintenance by going to Accounts Receivable then you should see Customer Maintenance.

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Overview of Customer Accounts

Header

S * Customer Maintenance (LET) 5/9/2025

Customer No. 0000004 Copy From... Renumber... More...

Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os 9. InstaDocs 9. Action

Country USA United States Residential
USPS Mail Verify Label
Accounts Payable
700 Court St
ZIP/Postal Code 95642-2130
City Jackson State/Province CA
Telephone (209) 223-6500 Ext Work
Fax (209) 223-1609
E-mail Address bfolena@amadorgov.org
URL Address

Terms Code 11 NET 30 WITH PO
Primary Contact
Ship Code FEDEX GROUND
Primary Ship To 1 GSA CORP YARD

Credit Limit .00
One Email per Invoice Batch

Get Pmt
Send Catalog

Salesperson HO HOUSE
Tax Schedule AVATAX AvaTax Schedule Exemptions...

Accept Cancel Delete

Under the header tab you can see:

- Customer Name
- Customer Number
- Country
- Billing Address
- Telephone number
- Email address
- Salesperson
- Tax schedule
- Terms code - payment terms.
- Primary contact
- Ship code - primary shipping method
- Primary ship to address
- Credit limit

Additional

S * Customer Maintenance (LET) 5/9/2025

Customer No. 0000004
Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Ds 9. InstaDocs 9. Action

Comment
Open Item Customer
Customer Status Active
[Inactive Reason](#)

Data Entry
Price Level
Default Payment Type CHECK CHECK
Discount Rate .000 %
Customer Type LAW ENFORCEMENT
[Item Code](#)

Printing
Sort
Customer Type STL
Statement Cycle M
Batch Fax
Print Dunning Message

Primary Payment Information
Payment ID EBZ1111
Payment Type EBZ eBiz Downloader
Name 11
Last Four Digits *1111
Expiration Date 12/2025
[Credit Cards/ACH...](#)

Accept Cancel Delete

Under the additional tab the important info is:

- Price level
 - Should be blank unless they are a reseller or distributor
 - If they are a reseller you will see a 1, 2, or 3. That will give the customer special reseller pricing that will automatically pull up on sales orders.
- Customer type
- Primary credit card on file
 - Note these are encrypted. You can only see the card type and last 4.

Statistics

Customer No. 0000004 🔍 🔄 ⏪ ⏩ 📄 Copy From... Renumber... More...

Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os 9. InstaDocs 9. Action

Last Payment Date	3/3/2022	Last Payment Amount	424.34
Last Statement Date	4/11/2025	Highest Balance	1,819.35
Last Finance Charge Date		Unpaid Finance Charges	.00

Average Days to Pay	67	Credit Hold	<input type="checkbox"/>
Average Days Overdue	39	Credit Limit	.00
Date Established	9/28/2005		
Date of Last Activity	3/3/2022		

Aging as Of 5/1/2025 🔄

Balance	Current	30 Days	60 Days	90 Days	120 Days
0.00	0.00	0.00	0.00	0.00	0.00

🏠 🌐 Accept Cancel Delete 🖨️ 🔍

Under the statistics you can see:

- Payment statistics
 - Last payment
 - Last payment date
 - Average days to pay
 - Highest balance
- At the bottom you can see how much the customer owes. If they have a credit like brass credit it will show as a negative balance. They can use that negative balance towards their orders.

History

S * Customer Maintenance (LET) 5/9/2025

Customer No. 0000004 Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary **5. History** 6. Invoices 7. Transactions 8. S/Os 9. InstaDocs 9. Action

Period	Ending	Sales	Cost of Sales	Profit %	Profit Amt	Cash Received	No. Invoices
01	Jan 31	.00	.00	0.000%	.00	.00	
02	Feb 28	.00	.00	0.000%	.00	.00	
03	Mar 31	.00	.00	0.000%	.00	.00	
04	Apr 30	.00	.00	0.000%	.00	.00	
05	May 31	.00	.00	0.000%	.00	.00	
06	June 30	1.13	.20	82.301%	.93	.00	1
07	July 31	423.21	161.81	61.766%	261.40	.00	2
08	Aug 31	.00	.00	0.000%	.00	.00	
09	Sept 30	.00	.00	0.000%	.00	.00	
10	Oct 31	1,597.63	887.88	44.425%	709.75	.00	1
11	Nov 30	1,597.63	887.88	44.425%	709.75	.00	1
12	Dec 31	.00	.00	0.000%	.00	.00	
Total		424.34	162.01	61.821%	262.33	.00	5

2021

Accept Cancel Delete

Under History you can see the sales and gross profit by month. This is internal information only. On the right hand side of the screen you can change the year you are viewing.

Invoices

S * Customer Maintenance (LET) 5/9/2025

Customer No. 0000004 Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary 5. History **6. Invoices** 7. Transactions 8. S/Os 9. InstaDocs 9. Action

Invoice No.	Invoice Type	Inv Date	Inv Due Date	Disc Date	Amount	Discount	Balance	Customer PO No.	Comment	Terms
0522151	Invoice	10/29/2021	11/28/2021		1,597.63	0.00	0.00			00
0510742	Invoice	7/14/2021	8/13/2021		424.34	0.00	0.00	22011		00
0509411	Invoice	6/29/2021	7/29/2021		1.13	0.00	0.00			00

Trans Date	Trans Type	Trans Amount	Pay Date	Check No.	Payment Ref	Cr Card	RMA No.

Balance	Current	30 Days	60 Days	90 Days	120 Days
0.00	0.00	0.00	0.00	0.00	0.00

Under invoices you can see all of their invoices the amount and the balance. If there is a balance that means they still owe on that invoice. If you double click on the invoice you can go into the invoice.

*** Customer Maintenance (LET) 5/9/2025**

Customer No. 0000004
Name North Carolina Dept.

1. Main 2. Additional 3. Statistics

Invoice No.	Invoice Type	Inv Date
0522151	Invoice	10/29/2021
0510742	Invoice	7/14/2021
0509411	Invoice	6/29/2021

Trans Date Trans Type Trans Am
10/29/2021 Invoice 1,597.63
11/24/2021 Credit Memo 1,597.63

Balance	Current
0.00	0.00

*** A/R Invoice History Inquiry (LET) 5/9/2025**

Invoice No. 0522151 Type INV Date 10/29/2021
Source S/O Order No. 0374739

1. Main 2. Lines 3. Payments 4. InstaDocs

Customer No. 0000004
Name Amador Co Sheriff's Office
Ship To 1 GSA CORP YARD
Source Journal SO-004199

Customer PD [] RMA No. []
Terms Code 00 NET 30 DAYS Apply To []
Salesperson HO HOUSE Schedule AVATAX
Ship Date 9/13/2021 Ship Zone [] Tracking...
Ship Via FEDEX GROUND Weight []
FOB [] IT User ID []
Confirm To []
Comment []

E-mail bfolena@amadorgov.org
Fax (209) 223-1609 Batch Fax []

Shipped By []
Recycling Credit []

Taxable	1,482.72
Nontaxable	.00
Freight	.00
Sales Tax	114.91
Discount	.00
Invoice Total	1,597.63
Deposit	.00
Net Invoice	1,597.63

Balance .00

From here you can view the invoice and print a copy to a PDF to send to the customer.

S/O's

*** Customer Maintenance (LET) 5/9/2025**

Customer No. 0000004
Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/O's 9. InstaDocs 9. Action

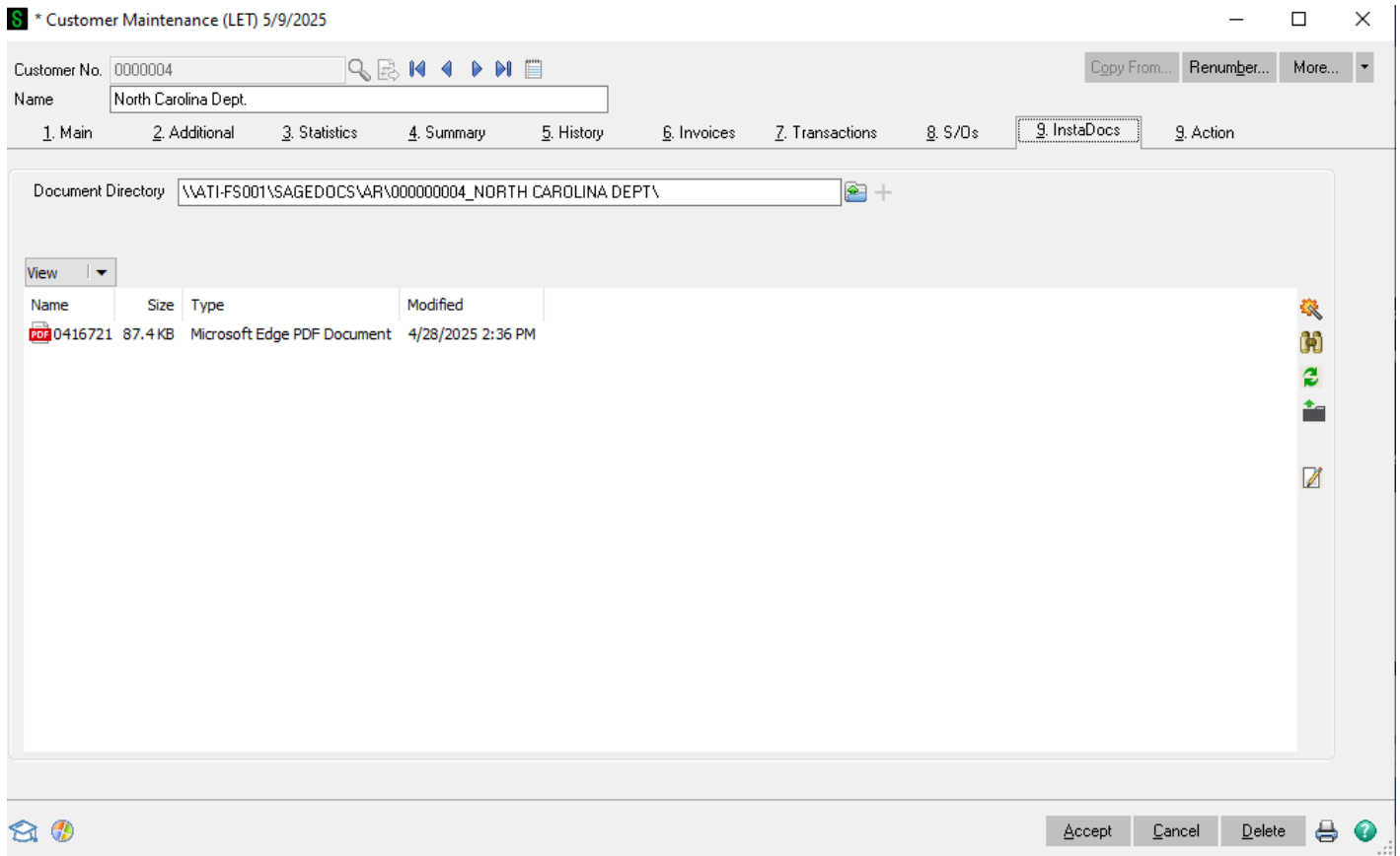
Number	Type	Order St...	Order Date	Ship/Expire	Customer PD No.	Ship To	Order Amount	Last Inv/Order
0398072	Quote	0	3/31/2023	4/30/2023		1	1,139.44	
0403514	Quote	0	11/17/2023	12/17/2023		1	2,816.15	
0416721	Quote	0	4/28/2025	5/28/2025	01433445	1	406.16	

Total Ordered 4,361.75

Accept Cancel Delete

S/O's shows all of the open quotes and orders that have not shipped yet. You can double click onto them to go into them to edit and/or save a copy as a PDF to send to the customer.

Instadoc's









The screenshot shows the Instadocs software interface. At the top, the window title is "* Customer Maintenance (LET) 5/9/2025". Below the title bar, there are input fields for "Customer No." (0000004) and "Name" (North Carolina Dept.). A navigation menu includes options like "Main", "Additional", "Statistics", "Summary", "History", "Invoices", "Transactions", "S/Os", "InstaDocs" (which is highlighted), and "Action". The main area displays a "Document Directory" for the path "\\ATI-FS001\SAGEDOCs\AR\000000004_NORTH CAROLINA DEPT\". A table lists a document with the following details:

Name	Size	Type	Modified
0416721	87.4 KB	Microsoft Edge PDF Document	4/28/2025 2:36 PM

At the bottom of the window, there are buttons for "Accept", "Cancel", and "Delete", along with a printer icon and a help icon.

Instadocs will have copies of all of the customers purchase orders, packing lists, dealer agreements, etc. This was recently started so there will not be as much as there will be in the future. If you double click on the document you can look at it.

Action





Customer No. 0000004      

Name North Carolina Dept.

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os 9. InstaDocs **10. Action**

Shipping Information	
Delivery Service	Account No
FedEx	12345
UPS	98765

Customer Contracts	
Metals Recycling	<input type="checkbox"/>

  Accept Cancel Delete  

The Action tab will show the customers shipping account. These automatically go onto the customers sales orders. If the shipping method is Customer Choice on the sales order this will be the account the order ships on.

Looking up/Finding a Customer

Finding existing customer accounts is extremely important, and helps us avoid having multiple accounts for the same customer. Sage is quite picky about how you search, so searching by company/department name is often not the best way to find accounts. For example, the account for the Provo Police Department could be saved under the following names:

- Provo Police Department
- Provo PD
- Provo Police Dept
- Provo City Police Department
- City of Provo
- City of Provo Police Department

Sage's search will only search for exact terms, so if you don't know exactly what name an account is under it won't come up. Luckily, there's details that are always consistent like address, zip code, and email domain. If you can't find an account by name, try searching by billing zip code, then email domain, then street address.

Searching by ZIP Code

To search by a customer's zip code, click on the search icon next to the Customer No. field in Customer Maintenance

On the search window that comes up, change the search field to "Zip Code" and punch in the customer's zip code. The address listed should be their billing address, so if they have a different address for shipping make sure to clarify that.

Searching by Email Domain

If zip code doesn't work, try searching by their email domain. Change the search field to "Email Address" and change the search filter to "Ends with". Put in everything after the "@" symbol in the customer's email address, and hit Find.

What if there are multiple accounts?

Sometimes multiple accounts will appear for the same department/company. At this point, you'll have to figure out which one to use. If any are marked with DNU, ignore those. If you scroll horizontally, you'll see some of the key details of the account. Try to find the account with the most details matching those of the customer you're talking to.

If multiple seem right, scroll all the way to the right and find the one that was used most recently. You can also check within the account to see if they've got all their details correct, or if they're set up with a tax exemption if applicable.

Creating a Customer

We're not able to create quotes or orders without an account to link them to, so it's important to set up customer accounts right.

The first step should be checking to see if an account already exists. Duplicates will make future orders significantly harder. Once you've confirmed that there's not already an account for the customer, click the button next to the search icon. This will assign an unused customer number to the account.

On the first tab, most of the information should be pretty self explanatory. If the customer has different addresses for billing and shipping, list their billing address in the address fields. The street address should always be in the first line, and the other two lines can be used for the contact or special delivery details.

If the customer has multiple email addresses, they can be separated with a semicolon.

Below those fields, you'll need to put something for the Salesperson and Tax Schedule. Salesperson should be HO (House) and Tax Schedule should always be AVATAX.

On the right side of the page, the Terms Code should automatically be set to 01 (Credit Card). Below that, list the primary contact for the account's name. That will pull up a screen where you can enter more of their details. This is helpful for reaching out to the customer in the future, so as much information as you can provide is best.

Below that, you can use the Primary Ship To box to set up multiple shipping addresses for one account. This is most useful for government or resale accounts where they may have several locations they have targets shipped to.

Once that's done, click over to the Additional Tab. Here, there's only two things we need to look at. First, if the customer is a reseller and has been approved for dealer pricing, list their Price Level in the box. Second, make sure you select the Customer Type that best suits them.

The last thing to do is set up the customer's tax exemption. For this, follow the Tax Exemptions guide.

Credit Hold

When an account is on credit hold, the customer will not have any new orders shipped to them until the unpaid balance on their account has been paid. If a customer is on credit hold, you'll see this on their account:

You can make quotes for a customer on credit hold, but when you send the quote over let them know that the order will not be shipped and send them any outstanding invoices as well. If they send a PO for the order before the hold is resolved, you can place the order and put it on hold with the reason code "CHOLD" to have the order held until the credit hold is removed.

Once their open invoices are paid, accounts receivable will remove the credit hold from their account which will automatically release all orders with the CHOLD reason. If you find an account with a credit hold that has no outstanding invoices, let accounts receivable know and they can remove the hold.

Tax Exemption

If a customer wants to be set up as tax exempt, there's a few specific steps you'll need to take to make sure they can order exempt, whether they want to do that online or with a rep.

The first step is getting a copy of their exemption certificate. They may send this when they request the exemption, or you may have to request it from them. Every department and company has one of these, and if they try to say they don't clarify that you require a document that has either their FEIN or TID number on it. You cannot exempt their account without one.

Once you've got that, find their exemption number on the document. It can take multiple forms, but the most common one is XX-XXXXXXX.

On the customer's account, open the Exemptions window. Put the customer's exemption number on the top line, then click the green check mark button to fill it in all the other lines as well.

At this point, you'll have to create the customer's account in Avalara. If you're adding an exemption to an existing account always try searching the customer's number in Avalara first to see if they've been set up in the past. If not, click "Add a customer" in the upper right corner.

On this page, fill in all the boxes that have an asterisk next to them with the details you already put into Sage. For the Taxpayer ID, you can list the exemption number. ****During this step, it's very important to list the customer code correctly. The customer code is their account number in Sage with two zeros at the beginning. Without these zeros, their exemption will not sync.****

Once you've filled that in, click "Save and add certificate". This will take you to a new page where you'll list the state that the exemption is active in, the reason for the exemption, and the exemption number again.

Once this is set up, it should automatically sync with Sage. If it doesn't, you may need to wait a few minutes or double check that the details are correct in Avalara.

Payment Terms

When you make a new account, the payment terms should default to 01 (Credit Card). This means the customer is only approved to pay for orders with either a card or a check. For international customers, you can change that to 12 (Wire) so they can make wire payments instead of using a card.

Some companies prefer to be invoiced. If their account has the terms code 00 (Net 30 Days), we can accept a PO and have them invoiced. If they'd like to be invoiced but their account isn't set up with Net 30 Terms, we'll need to get them approved. For Law Enforcement/Government customers, (insert procedure here since it's possibly going to be updated). For non-government customers, you'll have to send them the Net 30 Terms application and inform them that the approval process can take up to 30 days to be completed. Once you get the application back, send it to Ireland Thomas (ithomas@actiontarget.com) and she'll get back to you once accounting has made a decision.

Dealer Program

Customers who resell our products will sometimes ask for dealer pricing. If they do, send them a copy of the dealer application document ([link to the document here](#)). Once they send it back, send it over to Josh. He'll let you know if they're approved for dealer pricing.

If the customer is approved, try Looking Up Customer Accounts to see if they've already got an account with us. If not, you'll have to create one. Once their account is set up, on page 2 on the Customer Maintenance module, you'll see a spot to put their Price Level. Put the level they were approved for in the box, and their dealer pricing will automatically apply to all their future quotes and orders.

If a customer is curious about their dealer pricing level, you can use their previous year's spend to determine what it should be. If they've met the minimum spend for a higher tier, you can simply replace the number in the box to get them better pricing.

Wire Transfers

International customers may need to pay by wire if they don't have access to a card with USD on it. If that's the case, make sure the following comments are included on their quote:

1. Paid in US Funds
2. Action Target does not pay for taxes or fees

Once the customer has approved the quote, make sure the Payment Terms is set to "Wire" and change the quote to a standard order. When you do, put the order on hold with the reason code "Wire".

Once the order is placed, let accounts receivable know to keep an eye out for the wire payment. They'll let you know when it's come in, at which point you can go back to the order and change the status from "Hold" to "Open". At this point, the order will ship when it's ready.

Customer Shipping Accounts

If a customer would like us to ship using their own shipping account, be sure to make a note in customer maintenance on tab 10, as well as setting the Ship Via to "Customer Choice".

On each order using the customer's shipping account, make a /C comment for the warehouse to ship using the customer's account and list the account number. If the account is (accounts we can use), all that's needed is the number. If the customer would like to use a different shipping company, get the weights/dims from Jennifer and send them over to the customer. The customer will have to provide shipping labels and/or the BOL for the order themselves.