

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.

Revision #5

Created 15 September 2025 21:55:34 by Shane Withers

Updated 26 February 2026 16:21:12 by Josh Taylor