

Overview of Customer Accounts

Header

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

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

OK Print Help

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

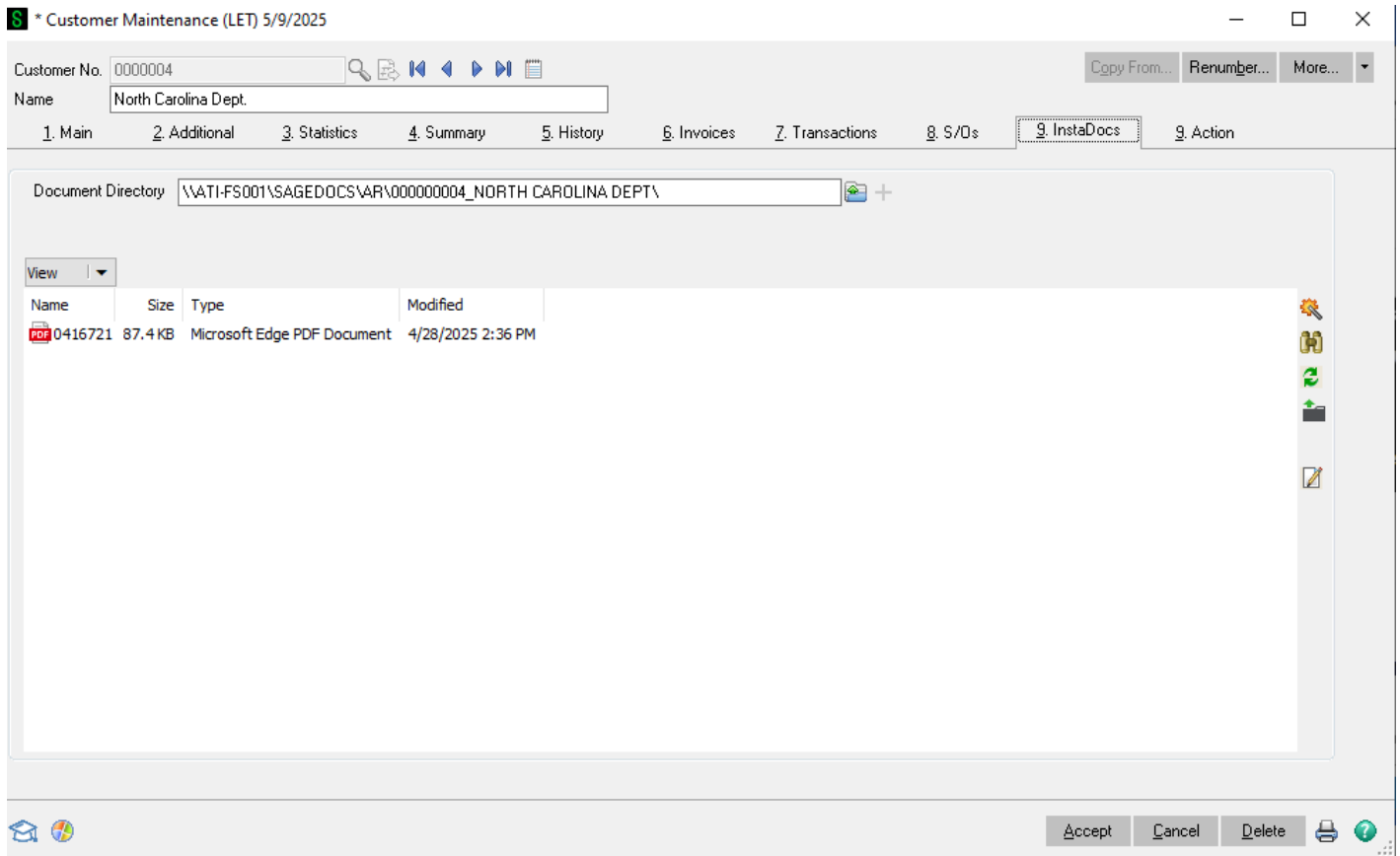
Number	Type	Order St...	Order Date	Ship/Expire	Customer PD No.	Ship To	Order Amount	Last Inv/Order
0398072	Quote	0	3/31/2023	4/30/2023		1	1,139.44	
0403514	Quote	0	11/17/2023	12/17/2023		1	2,816.15	
0416721	Quote	0	4/28/2025	5/28/2025	01433445	1	406.16	

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 "1. Main", "2. Additional", "3. Statistics", "4. Summary", "5. History", "6. Invoices", "7. Transactions", "8. S/Os", "9. InstaDocs" (which is highlighted), and "9. Action". The main area displays a "Document Directory" for the path "\\ATI-FS001\SAGEDOCs\AR\000000004_NORTH CAROLINA DEPT\". A table lists a single document:

Name	Size	Type	Modified
PDF 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 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 **10. Action**

Shipping Information

Delivery Service	Account No
FedEx	12345
UPS	98765

Customer Contracts

Metals Recycling

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.

Revision #5

Created 15 September 2025 21:53:44 by Shane Withers

Updated 9 October 2025 20:12:57 by Shane Withers