



Create customer records

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Set up customers and add vendor information at this time if the previous step was completed. If not, vendor information can be added at a later time.

Tables > Customer Information Accounts Receivable

Save Delete

Customer Name: ABC Consulting Customer Nbr: 999999 Retrieve Add Directory Documents

CUSTOMER INFORMATION

Customer Name: ABC Consulting Customer Nbr: 999999
 Status: Active Inactive Vendor Nbr: 11682 ABC Consulting
 Primary Contact: Dave Matthews
 P.O. Required Phone Number: (555) 555-5555 Extension:
 Fax Number: () -
 E-mail: abconsulting@email.com

Customer Address:

Attention: D.Matthews Local Use:
 Street Nbr/Name: 55 Street
 City/State: San Antonio TX - Texas
 Zip Code: 78250 +4:

- If **Auto Assign Customer** is selected on the District Administration > Options > Accounts Receivable Options page, then the **Customer Nbr** field is automatically populated with the next available customer number.
- If **Auto Assign Customer** is not selected, type a new customer number.