



Customer Information - BAR2000

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This page is used to establish and maintain a record for each customer doing business with the district.

Add or retrieve a customer record:

| Add | | | Retrieve an existing record. | <p>Search for a record.</p> <p>In the Customer Name field, type the customer's name (e.g., Angel ISD). As you type the data, a drop-down list of corresponding customer names is displayed. Select a customer name. The field is required.</p> <ul style="list-style-type: none"> • If the customer name is not known, click Directory. The Customers lookup is displayed. • To search for a specific customer name or customer number, type data in one or more of the search fields. • To search through all available data, leave all fields blank. • Click Search. A list of data that matches the search criteria is displayed. • Select an item from the list. Otherwise, click Cancel. <p>In the Customer Number field, if you type a partial customer number (from one to six digits) and tab out of the field, the field is zero-filled to equal six digits. The field can be a maximum of six digits and is required.</p> <ul style="list-style-type: none"> • As you type the data, a drop-down list of corresponding customer numbers is displayed. Select a customer number. If the customer number is not known, click Directory. The Customers lookup is displayed. • To search for a specific customer name or customer number, type data in one or more of the search fields. • To search through all available data, leave all fields blank. • Click Search. A list of data that matches the search criteria is displayed. • Select an item from the list. Otherwise, click Cancel. |
|----------------------|---|--|-------------------------------------|---|
| | OR | | | |
| | <p>Add a customer. Click to add a customer record.</p> | | | |
| Field | Description | | | |
| Customer Name | Type the customer's name (e.g., Angel ISD). | | | |
| Customer Nbr | <p>This field is automatically populated with the next available customer number if Auto Assign Customer is selected on the District Administration > Options > Accounts Receivable Options page.</p> <p>If Auto Assign Customer is not selected, type the new customer number.</p> | | | |

| Field | Description | |
|-------------------------|--|--|
| Status | By default, this field is set to Active . If the customer is set to Inactive , the record remains, but you cannot use it in posting data. If set to Inactive , you can use the customer name for transactions that were created prior to setting the flag (e.g., printing invoices, reversals, changes), but not to create new transactions. | |
| Vendor Nbr | Type a valid vendor number, which is validated against the vendor file. As you type the data, a drop-down list of corresponding vendor numbers is displayed. Select a vendor number. The following field is populated with the vendor name when a valid vendor number is typed. | |
| Primary Contact | Type the name of the customer's primary contact (e.g., business office manager). | |
| PO Required | Select if the customer is required to submit a purchase order before the product/service can be invoiced. By default, P.O. Required is selected. If selected and no purchase order number is entered when creating an invoice for this customer, the error message "P.O. Required" is displayed when you try to save the invoice. | |
| Phone Number | Type the phone number in the ###-###-#### format. | |
| Extension | Type the extension number. The field can be a maximum of four digits. | |
| Fax Number | Type the fax number in the ###-###-#### format. | |
| E-mail | Type the e-mail address to be used to send information to the contact person. The field can be a maximum of 45 characters. Click E-mail to send the e-mail using the user's default e-mail client. The To: e-mail address is populated if the E-mail field contains an e-mail address. | |
| Customer Address | Attention | Type the customer point of contact or other pertinent address information (e.g., Business Office). |
| | Local Use | Type the local use information. The field can be a maximum of 35 characters. |
| | Street Nbr/Name | Type the customer's mailing or physical address. Use the apartment abbreviation (APT) or the suite abbreviation (STE) and number, if known. |
| | City/State | Type the name of the city where the customer is located. Click  to select the two-character state code. |
| | Zip Code | Type the five-digit postal code for the delivery area. |
| | + 4 | Type the additional four digits of the zip code, if known. |

Click **Save**.

Other functions and features:

| | |
|------------------|---|
| Delete | <p>Delete a record. Click to delete a customer record.</p> <p>Notes:</p> <p>Normally, the Delete function is used just after creating a customer in error or after using the Purge Prior Year Invoices utility, and you want to delete customers who no longer have invoices in the system. When you try to delete a customer record, the system checks that there are no invoices with this customer number. This includes both open (balance greater than zero) and closed (balance equal to zero) invoices. If the system finds either type of invoice for a customer, it will not allow you to delete the customer. Existing customer information can only be deleted if no outstanding invoices exist and the customer does not have any cash receipts.</p> <p>You can change any information for an existing customer record except the customer number. If a record is created with a customer number that you now want to change and it has no invoice records, you can delete the existing customer record and then add it back with the new number.</p> |
| Retrieve | <p>Retrieve data. The Retrieve button is also used to retrieve information from the last save. If you click Retrieve, any unsaved changes are lost.</p> |
| Documents | <p>View or attach supporting documentation.</p> |



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