Customer Detail Screen - How To's

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Help Topics

'**Customer Details**' is a comprehensive screen that displays every significant information about a Customer all on one screen. It is divided into three (3) main sections to organize data and functions:

- **Main Fields (section)**
  - **Company Name** - Name of Company/Business or Individual Customer
  - **Contact Name** - Customer Representative / Contact Person
  - **Title** - Position/Designation (of the Contact person)

    - **Address Line 1**
    - **Address Line 2**
    - **City**
    - **State / Province**
    - **Zip / Postal Code**
    - **Region**
    - **Country**
    - **Customer #**
    - **Phone**
    - **Extension**
    - **Fax**
    - **Cus Service Rep** - Your Customer Service Representative. Select from drop down list.
    - **Product & Services** - Products/services offered (if Customer is a business entity)
    - **Email**
    - **Website**
    - **Active**
    - **Type** - The default Type of customer or prospect. This is a user definable value to help categorize, group, and classify your records.
    - **Sub Type** - Similar to the Type, this is a user definable value to help categorize, group, and classify your records.
    - **Status**
    - **Warehouse** - The default warehouse for the particular Customer.
    - **Address Type** - Bill To, Ship To or Both?
    - **To Sync** (QBO) - (checkbox) gets checked automatically each time a new Customer record is created in 1place then syncs with QuickBooks Online (QBO) when the record is saved.
    - **Resync Flag -** (checkbox) gets checked when a Customer record is changed in 1place then syncs with QBO.
    - **Last Synced** - Date & time last synced with QuickBooks Online
- **Tabs (section)** - *see below.*
- **Footer (section)**
    - **New** (button) - To create a new Customer record.
    - **Delete** Customer (button) - To delete that screen.
    - **Save** (button) - To save the actions/changes made on that screen.
    - **Help** (button) - Leads you to self-help articles about the **Customer Detail** screen.
    - **Close** (button) - To close that screen.

Shortcut Key: **Ctrl + F3**, or
On the **Quick Start Menu**, click the **+ icon** and select **Customer,** or
Click the **New** button on the lower left part of either the **Customer List** screen or **Customer Details** screen, or
On any of the **Sales Order** screens: When typing in a **Bill To or Ship To Customer** that is not found in the **Drop down** list, click **+ Add New** (lowest part of the drop down list) to add a new Customer record.

- Each Customer record can have an unlimited number of related 'Contact' records. To add a Contact record to a Customer record, click the **Contacts** tab (on the particular **Customer Details** screen). Type in the Name and other details on the last blank row then click **Commit Contact** and **Save**.

- On the **Customer Details** screen, make the necessary changes then click **Save, or**

- On the **Customer List** screen, click the **Edit** button to unlock that screen and make the necessary changes. (Note: Any changes made will be automatically saved)

- Using Shortcut Key: **F3**, <u>or</u>
- On the **Quick Start Menu** (Green buttons), click the **Search** (M**agnifying Glass**) icon then select **Customers**, <u>or</u>
- (If already on the **Customer List** screen) use the **Search** feature (M**agnifying Glass** icon) to type the Company Name or any information/keywords to filter multi search, <u>or</u>
- From a **Sales Order screen**: Click on the **Magnifying Glass** button next to the **Bill To** or **Ship To** tabs.

- Shortcut Key: **Shift+F3**, <u>or</u>
- On the **Quick Start Menu** (Green buttons), click the **List** button and select **Customers**, <u>or</u>
- On the **Main Menu Bar**, click **Customers.**

- Find Customers by:
  - Using Shortcut Key: **F3**, <u>or</u>
  - On the **Quick Start Menu** (Green buttons), click the **Search** (M**agnifying Glass**) icon then select **Customers.**
- Click on the **drop down** icon on the **Search By** filter box to select different filter criteria such as First Name, Last Name, Company Name, Customer Number, Phone, Address, State, Zip Code, Region, Fax, Sales Rep and Address Type.
  - Note: You can also do 'multi-search' on this all-inclusive **Search By** filter box.

- On the **Customer List** screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**.
- Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion.
- (Note: You cannot delete a Customer record if it has any related Sales Transactions, such as Quotes, Sales Orders, Invoices, Payments, etc)
- is related to any other types of data, such as To preserve the integrity of the database, you cannot delete any customer record that has been used on any of the Sales screens).

- On the **Main Menu** bar, click on **Reports > Customers.**
- Define your Report.
  - **1place** allows you to generate different types of reports according to your needs. On the **Report Criteria** section, you can define which information you want to include on the report.
    - **Customer** (filter) - Choose a Customer or include All
    - **Group By** (filter) - Group the Customers by Type, Subtype or Status.
  - Click on **Customers (Date Added)** to add the **Report Period** filter section and select from the **drop down** filter lists or manually input the dates 'from' and 'to'.
- Click on **Run Report**.
  - Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
  - Note2: At this point, you may choose to Print, Email or Download your Report copy.

- After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.
- On the **Customize Report popup** screen:
  - (Optional) Select the **Min Access Level** from the **drop down** icon.
  - (Required) Type in the **Report Name** (whatever you want to call your Report).
  - (Optional) Type in any **Report Description**.
  - (Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
  - Click on **Save.**
  - Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** if you checked the **Favorite** box.
  - Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
  - Note3: Click on the **X** button to permanently delete any Custom Report from the list.
- Note: You have the option to Email, Print or Download a Report copy (see instructions below).

On the **Customer List** screen:

- Select the record(s) by checking the box(es) .
- Click the

  button to Print and

  to download (in Excel form).
- There is also an option to Share

  record(s) and this feature will be available in the future.

For Customer Reports, go to **Main Menu** Bar > **Reports** > **Customers,** create your Report (*see previous instructions) then click on the

button (upper right).

The **Print Preview** popup screen will appear.

- DOWNLOAD COPY: Click on

  button (upper right) to download the Report. Save in your PC.
- EMAIL COPY: Click on

  Send Email

  button (lower right) to send a copy of the Report through email. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on

  Send Email

  button (lower right).
- PRINT COPY: Click on

  button (upper right) to print the Report. Adjust Print Settings then click on

  Print

  button (lower right).

You can enable (or disable) various *tabs* of information on the **Customer Details** screen by clicking the **Gear** button (located on the same row of the tabs) and checking to select tabs. The following is a list of the tabs that can be used to enter or view additional information related to the Customer record that you are on:

Sales / Returns (section)

- This shows a grid of these types of fields:
  - **Sales Invoices:**
    - **30 Days**
      - # Invoices: This shows the total # of Sales (**for the selected Customer**) in the Past 30 days.
      - This Year: This shows the total amount of Sales in the past 30 days.
      - Last Year: This shows the total amount of Sales in the past 30 days - LAST YEAR.
      - Variance %: This shows the variance of the Sales year over year.
    - **90 Days** (Same as above)
    - **365 Days** (Same as above)
    - **2 Years Ago** (Same as above)
  - **Sales Returns**: (Same as above, but showing all of the same type of details for the Items RETURNED (on Credit Memo's). Click on the **Recalculate** button to refresh the info.

Quick Sales Info (section)

- This section (may be viewed by users granted with the rights to view sales costs and profit margins) shows the: Total Sales, Average Sales, Average # Days Between Sales and the # Days Since Last Sale. Click on the **Recalculate** button to refresh the info.

Accounts Receivable / Credit Info (section)

- This section provides a quick summary of A/R Aging information, and other customer credit details. Click on the **Recalculate** button to refresh the info.
  - The **Aging fields** for the Current, 1-30, 31-60, 61-90 and 91+ display the total unpaid dollars--based on the Invoice Payment Terms field/calculation (not the actual # of days since the Invoice date).
  - The **Customer Since** field shows the exact date and time of update/recalculation of the data related to **Accounts Receivable/Credit Info**.
  - The **# of Unpaid Inv's** field shows the total # of Invoices that are not paid in full.
  - The **# Days Oldest** shows how many days old the *oldest* unpaid Invoice is from today.
  - The **Average # Days/Pay** shows the average # of days it has taken the customer to pay all invoices on record. The calculation method is as follows:

    - For all PAID Invoices, it calculates the # of days between the Invoice Date and the newest payment date (meaning the last payment for each invoice).
    - For all UNPAID Invoices, it calculates the Total # of Days between the Invoice Date and today. (For instance, if an Invoice is 60 days old, but has not been paid, (since the computer has no idea how many more days it may take for the customer to pay the Invoice in full), it calculates that Invoice as though it had been paid today. (It calculates this way in order for unpaid Invoices to not reduce the overall average # of days to pay).
    - Then the system adds all of the 'days' up, (for all Paid and Unpaid Invoices), and divides the total # of days by the total # of Invoices.

- You can **track** as many individual contacts related to the customer as you would like using the **Contacts** tab.
- To **Add a** Contact record, type in the contact details on the last available empty row then click **Commit Contact** to save.
- To **Edit** a Contact record click the **Edit** button (M**agnifying Glass** icon) under the **Action** column on the same row of that particular Contact record to display the **Contact Information** screen then edit the fields as necessary. Click **Save**.
- To **Delete** a contact record, click the **Delete** button ('**X**' icon) under the **Action** column on the same row of that particular Contact record then select **Yes**.
- To **Create a Task** for a contact, click the **Add New Task** button (bullet list icon) under the **Action** column on the same row of that particular Contact record then type in the necessary details. Click **Save**. Another way is to simply **right-click** on any of the fields on the same row for that contact record then select **Add New Task**.
- The only difference between **Adding New Task** and **Adding New Completed Task** is whether or not the **Task** is checked or not (on the **Add New Task** screen).
- To **send an email** to a contact, **right-click** on the contact and select **Send Email**.

- The **Tasks** tab displays all tasks related to the Customer record that you are viewing.
- To **view** a task related to a Customer:
  - Find that Customer (type **F3** then search).
  - On the **Customer Details** screen, click on **Tasks** tab.
  - You can use the **Search** filter (above, left of the Task record table) to easily find the task.
- To **create a task** related to that particular customer:
  - Click the **New Task** button on the lower left part of the same screen (**Customer Details** screen > **Tasks** tab).
  - Type in the necessary details and click **Save**.
  - Another way is to simply **right-click** on any of the fields on the Task record table then select **Add New Task**.
    - Note: The only difference between **Adding New Task** and **Adding New Completed Task** is whether or not the **Task** is checked or not (on the **Add New Task** screen).
- To **edit an existing task:**
  - **Right-click** on the task record row and select **Edit Task** then make the necessary changes. Click **Save.**
  - Another way is to click the **Edit** button (**magnifying glass** icon) under the **Action** column on the same row of the particular task record.
- **Optional Preferences**:
  - You have the option to activate prompt messages when posting completed tasks:

  - on a date other than the date of the Task, and
  - to reschedule another follow up Task.
    To do this, click on the G**ear icon** on the top right corner of the screen then select **Settings**. Under the **Settings Type** select **Tasks** then check the box of your selected task preference/s.

  - You can activate **Auto Create New Task From Email** when the Email Subject has the assigned Prefix (created by you). To do this, click on the **Gear icon** on the top right corner of the screen then select **Settings**. Under the **Settings Type** select **Tasks** then type in the assigned Prefix on the fillable text box after the description.
  - You can hide the **Tasks** tab (so it does not appear on the **Customer Details** screen). To do this, click the **Gear** icon (on the rightmost part of the tabs row) then uncheck the **Show Tasks tab**.

- The **Jobs** tab displays all Jobs related to the Customer record that you are viewing. The Jobs table shows the following information: **Job ID**, **Group**, **Priority**, **Orig Date**, **Description**, **Status**, **Type**, **Sub Type**, **Exp Date**, **Company**, **Assigned To**, **From Email**, **Import Code** and **Action**.

    - Note: You have the option to **show/hide** these fields of information by clicking on the **Gear** icon (just above, right of the Jobs table) and checking/unchecking on the columns/fields.
- You can **open and view** a particular **Job Detail** screen by clicking on the **Magnifying Glass** icon (under **Actions** column) of the selected Job.
- To permanently **delete** a Job ID related to this particular Customer, click on the **X** button (under **Actions** column).
- You can **sort** the Jobs list by pointing the mouse cursor on the **List** icon (under **Sort** column) of any Job record then drag to position it where you want on the List.
- Use the **Search** filter (above left of Jobs table) which is a multi-search (all-inclusive) feature to easily look for any Job related to that Customer.
    - Note: You can **link** any existing Job record to other record types, such as Tasks, Quotations, Sales Orders, Invoices or Credit Memos by selecting the Job of your choice from the **Job selection drop down list (on any of those record types screens)**.

The **Pricing** tab provides many different ways to set up customer prices.
If no set up is selected on any settings on the **Custom Pricing** tab, the system simply takes the List Price of the item(s) for that customer. (Note: To view the List Price of a particular item, go to **Items** (**Main Menu** Bar) then select the item to open the **Item Details** screen. Click on **Financial** tab. You will see the List Price on the **Pricing** section.)
On the **Custom Pricing tab** screen, you can:

Select a **Default Pricing Method** on the drop down list which includes:

- X Discount off the Item List Price
- X Multiplier off the Item List Price
- X Markup above the Item Cost, and
- X item Price Level

And/Or...Click the **Add Custom Pricing Template** drop down icon and select from the Custom Pricing Template list (set up by your company). Click on **Go** button. (Notice that the Custom Prices settings will be displayed on the Custom Prices table below it.)

And/Or... Manually add **Pricing Categories** or **Specific Items** to further define the Custom Prices table.

Note1: The set prices on the Custom Prices table over-ride the selected **Default Pricing Method**.
Note2: You can add an unlimited number of unique items (under **Specific Items** field) to set special price.
Note3: You can change any price or pricing method at any time (even if they were added from a Custom Pricing Template). Furthermore, you may set to retain these changes and not be over-written or modified (when you do mass update of prices on the **Pricing Templates** screen on a later date). Just remove the link to the Pricing Templates (or in other words, 'lock the price') per row of the Custom Prices.

- To do this, just click on the **Open Padlock** icon (under **Actions** field). Click **Yes** on the popup prompt. Notice how it changed to a **Close Padlock** icon.

Note4: You cannot apply two (2) or more pricing methods (i.e. Price Level, Discount, Markup, Multiplier, Specific Price) per row.
Note5: The pricing method for **Specific Item** always over-ride the pricing method for **Pricing Category** if an item is listed on both column lists. To illustrate further:if Product A has been added to the list on the Custom Pricing table under **Specific Item** AND Product A is also in **Pricing Category** X on the same Custom Pricing table, the pricing method assigned to Product A under **Specific Item** column would take precedence over the pricing method of that same item in **Pricing**

Category X.

The parts of the **Pricing Table** are as follows:

- **Pricing Category** - This is the category group that is linked to the items.
- **Specific Item** - The specific item listed in your Items List (that is available to be purchased by your customers) which will be defined in the Pricing Table.
- **Price Level** - These are pre-set Price Codes and you can give any name to it (Note: To do this, go to **Settings** > **Item Settings** > **Item Pricing Levels.** Click **Save.**).. This can be assigned as the **Default Pricing Method** for that Customer. This can also be used in the **Custom Pricing** table (and **Pricing Templates,** on the **Pricing Template** screen).
- **Discount** (off List) - The set Discount % that will be deducted off the List Price.
- **Markup** (Above Cost) - The set amount that will be added on top of the List Price.
- **Multiplier** (off List) - The set multiplier that will be deducted off the List Price.
- **Specific Price** - The specific amount to be set as the new price instead of the List Price.
- **Qty Ordered** (From) - The minimum quantity set for volume discounts.
- **Qty Ordered** (To) - The maximum quantity set for volume discounts.
- **Actions** - Contains the X icon (or delete icon) used when removing Pricing Item Categories and settings on the Pricing Table.

- The **Settings** tab sets and displays the customer's default profiles specifically for the following information:
  - **Shipped Via -** This is the 'shipping method' (i.e. UPS, Truck 1, Route 1, Customer Pickup, etc). Set this to properly 'Pick' and 'Dispatch' the orders from that particular Customer. Click the **drop down arrow** then select the **carrier** or service that will deliver the merchandise. (Note: Carriers/services can be predefined in **Sales Settings**.)
  - **Sales Tax** - Select the applicable **Sales Tax Rate.** (Rates can be predefined in **Sales Taxes Settings**.)
  - **Tax Exempt -** Click the box to select if that customer is exempted from tax then indicate **Reason for Exemption**.
  - **Federal Tax ID** - The unique tax ID of that particular customer.
  - **Payment Terms** - Select the applicable invoice payment terms. (Payment Terms can be predefined in **Sales Settings**.)
  - **Payment Method** - Select the method of payment. (Payment Methods can be predefined in **Sales Settings**.)
  - **Sales Rep** - Select the person involved in the sales transaction with that particular customer.
  - **Credit Limit** - The maximum amount of credit extended to the customer.
  - **Credit Days** - The allowed time frame between customer's date of purchase and the payment due date.
  - **Current Balance -** The customer's total unpaid balance on its credit limit.
  - **COD -** Check if **Cash On Delivery**
  - **Credit Hold -** Checked box indicates that customer's credit is put on hold until the sales transaction is settled or paid.
  - **Admin Credit Hold -** Checked box indicates that customer's credit is on hold due to either it has gone over its credit limit or has late payment/s.

- The Sales History tab **displays** all related **Quotations**, **Quotation Line Items**, **Transaction Ledger**, **Sales Orders**, **Sales Order Line Items**, **Invoices/Credit Memos**, **Invoice/Credit Memo Line Items** and **Invoice Payments**. Click on the tab of any particular record list to open and view its **historical details**.
- You can **open/view:**
  - any **Quotation** screen by clicking on the row of the particular Quotation # whether you are on the Quotations or Quotations Line Items tabs.
  - any **Sales Order** screen by clicking on the row of the particular Sales Order # whether you are on the **Sales Orders** or **Sales Order Line Items** tabs.
  - any **Invoice** or **Credit Memo** screen by clicking on the row of the particular Invoice # or Credit Memo # whether you are on the **Invoices/CM's**, **Invoice/CM Line Items** or **Payments** tabs.
- **Optional Preferences**:
  - You can hide the **Sales History** tab (so it does not appear on the **Customer Details** screen). To do this, click the **Gear icon** (on the rightmost part of the tabs row) then uncheck the **Show Sales History tab.**

- All Marketing related details are recorded and displayed on the **Marketing Info** tab to help you keep track of your Marketing activities and strategies implemented for each particular Customer. Record details as follows:
    - Source - Source of contact.
    - SIC Code - the Standard Industrial Classification Code of the particular customer. Used when creating targeted marketing campaigns.
    - # of Employees
    - Last Campaign Date
    - Last Campaign Method
    - Last Campaign Piece
    - Next Campaign Method
    - Next Campaign Piece
    - Last Contact Date
    - Last Contacted
    - Last Contacted By
    - Last Contact Method
    - Last Contact Results
    - Next Contact Date
    - Next Contact By
    - Next Contact Method
    - Next Contact Description

- You can **store multiple notes** according to the following **Note Types**:
    - **Order Entry/Sales Notes**
    - **AR Notes**
    - **Internal Notes**
    - **Delivery Notes**

      To do this, click the **drop down arrow** then select a note type. Paste or type in related notes on the fillable text area below it. Click **Save**.

You can store various documents of different types (spreadsheets, presentations, etc.) related to a Customer.

- **To store a document**:
    - Click on **Add New Document** button (top, right side of the documents table list).
    - On the **Create New Document** popup screen, enter **Document Name** then select the **Document Type** from the drop down arrow list.
    - Click on **Create**.
- The **Search** button (above left) is a multi-search filter that searches for keywords across all fields to help you easily find a document.

- All changes made on the **Customer Detail** screen are automatically recorded on this Audit Log. This tab shows the following details:
    - **Updated By** - Name of the specific User who made the update.
    - **Date** - The exact date and time the update was made.
    - **Item Number** - Specific number of an inventory.
    - **Change Type** - Type of update made (edit, delete, etc.)
    - **Column Name** - The title of the text field where the update was made.

  - **Old Value** - The recorded value/information before the update.
  - **New Value** - The newly entered value/information.

No instructions at this time.

- The API (Application Programming Interface) tab... This tab is used to LINK your CUSTOMER record to another 3rd party vendors Customer #.
  - For instance, suppose you have an API link to CCC True. Your Customer ABC might be customer # 123 in **1place**. But THEIR Customer # might be 456. This tab gives the API connection a way to submit the CCC Customer # to CCC so they will be able to identify which customer is which in their system.
- Using the Example above here are the steps to enter the correct Customer ID for CCC:
  - 1—Get a list of all of the Companies by name, address, and CCC Customer ID #.
  - 2—Press **F3** to look up the Customer record.
  - 3—Click on the **API** tab.
  - 4—In the **Third Party Type** column select **CCC True** from the drop down list.
  - 5—In the **Third Party Customer ID** type in the CCC Customer ID # that they provide to you.
  - Repeat Steps 2-5 for each name.

Overview

The **Merge Customers** feature allows you to consolidate customer records while preserving important customer and transaction history. Depending on your business needs, 1place provides multiple merge options to help eliminate duplicate records, consolidate customer accounts, or associate sales history with the appropriate billing customer.

The available merge options include:
- **Merge Customer Into Another Customer** – Transfers a customer's related records to another existing customer. After the merge is complete, the original customer record is permanently deleted.
- **Import Merge Customer** – Performs multiple customer merges at once by importing an Excel file containing the customer mappings. This is ideal when consolidating a large number of customer records.
- **Merge Into Bill-To Customer** – Merges a **Ship-To** customer into its assigned **Bill-To** customer. This updates existing sales records so the assigned Bill-To customer becomes the billing customer, while the original customer is retained as the Ship-To customer on those transactions.

Using the appropriate merge option helps maintain accurate customer records, preserve transaction history, and improve data consistency throughout 1place.

> **Important:** Customer merge operations permanently modify customer records. Before proceeding, verify that you have selected the correct customers, as some merge actions cannot be undone.

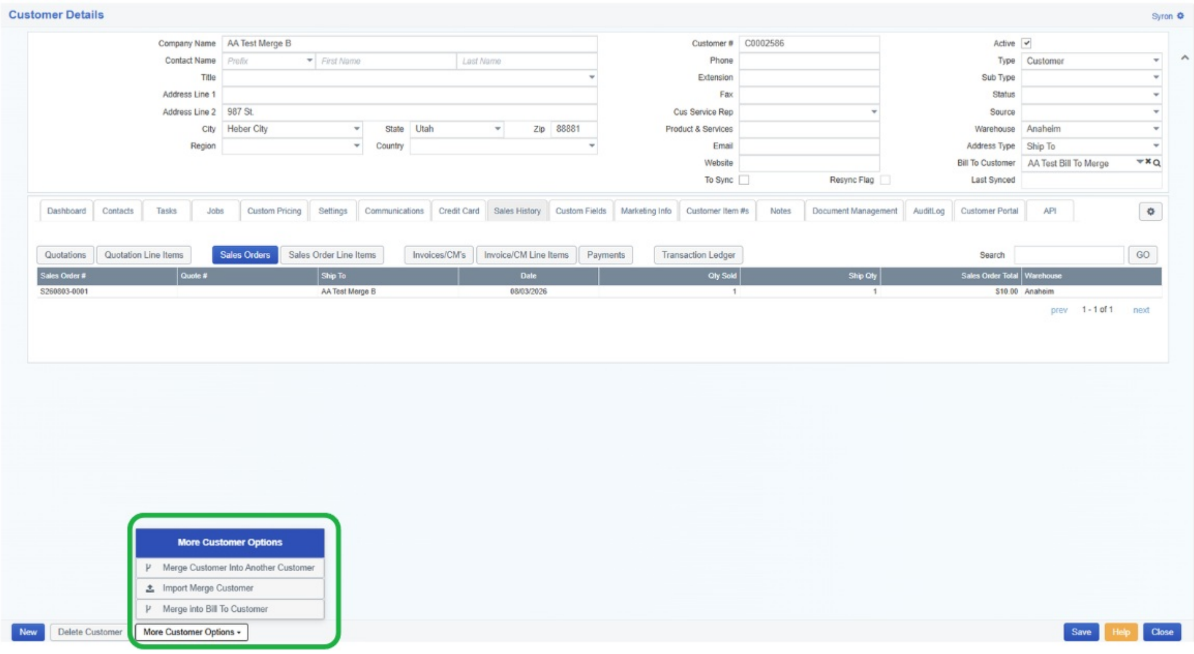
How to Access the Merge Customer Options

1. Open the **Customers** module.

2. Select the customer record you want to manage.

3. On the **Customer Details** screen, click **More Customer Options** located in the **lower-left corner** of the

screen.



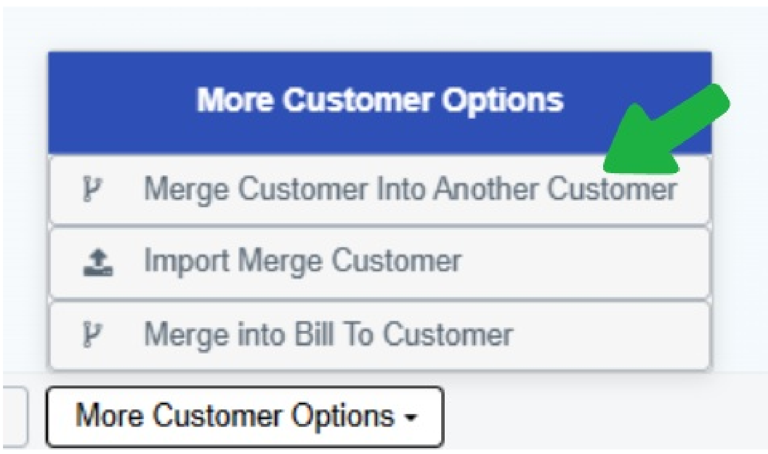
The **More Customer Options** menu provides the following merge options:

- **Merge Customer Into Another Customer**
- **Import Merge Customer**
- **Merge Into Bill-To Customer** – Merges the selected customer into its assigned Bill-To customer.

Use this option to merge a single customer record into another existing customer.

Step 1. Open the Merge Customer Window

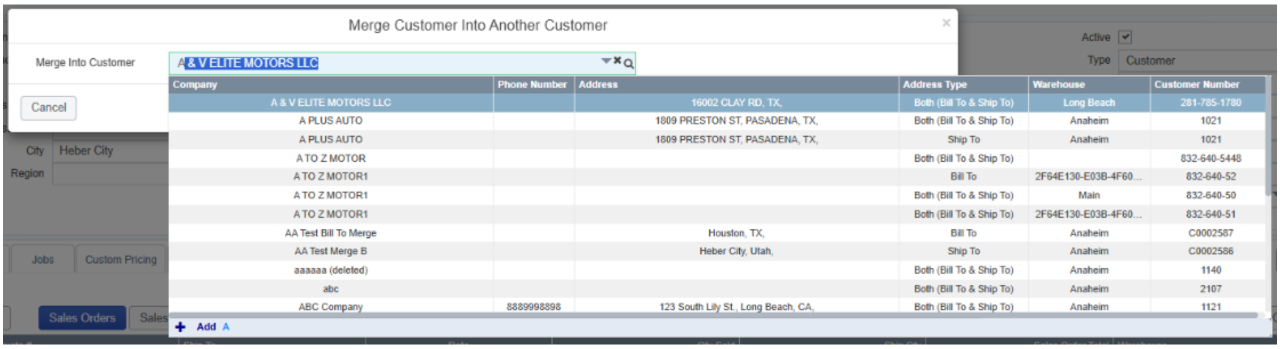
1. Open the customer record you want to merge.
2. Click **More Customer Options**.
3. Select **Merge Customer Into Another Customer**.



A pop-up window will appear, allowing you to select the destination customer.

Step 2. Select the Destination Customer

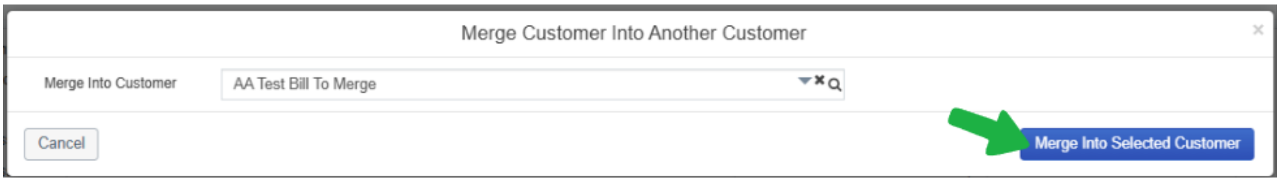
Choose the customer that will receive the merged records.



You can:

- Type the customer name to search for the customer.
- Select the customer from the drop-down list.

After selecting the destination customer, click **Merge into Selected Customer**.



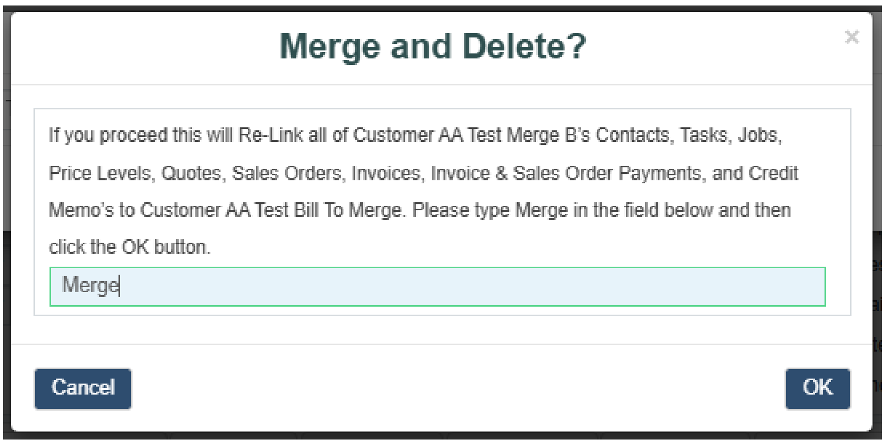
Step 3. Confirm the Merge

A confirmation prompt will appear explaining that the merge will transfer all related records from the source customer to the selected destination customer.

To proceed:

1. Type **Merge** in the confirmation field.

2. Click **OK**.



The following records will be re-linked to the destination customer:

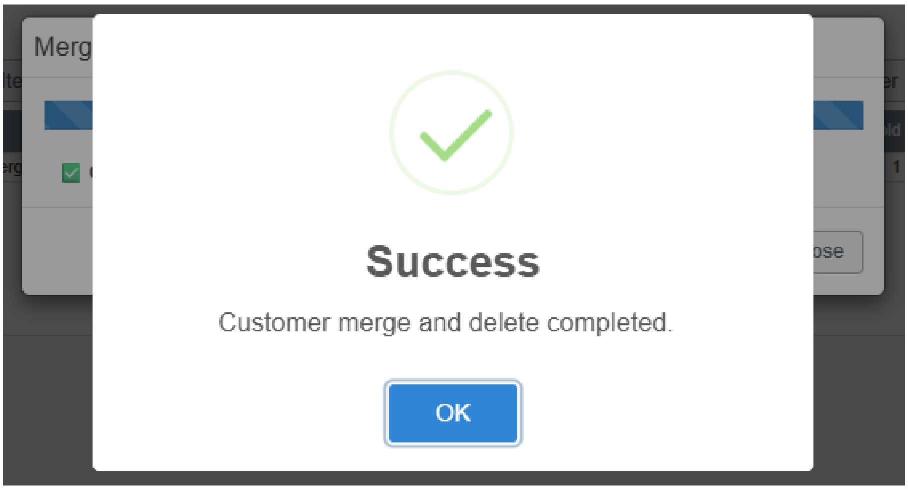
- Contacts
- Tasks

- Jobs
- Price Levels
- Quotes
- Sales Orders
- Invoices
- Invoice Payments
- Sales Order Payments
- Credit Memos

After the merge is complete, the source customer record is permanently deleted.

Step 4. Review the Confirmation

Once the merge has completed successfully, the following message is displayed:



1place automatically opens the destination customer's record, where all transferred records are now available.

Use **Import Merge Customer** when you need to merge multiple customer records at once.

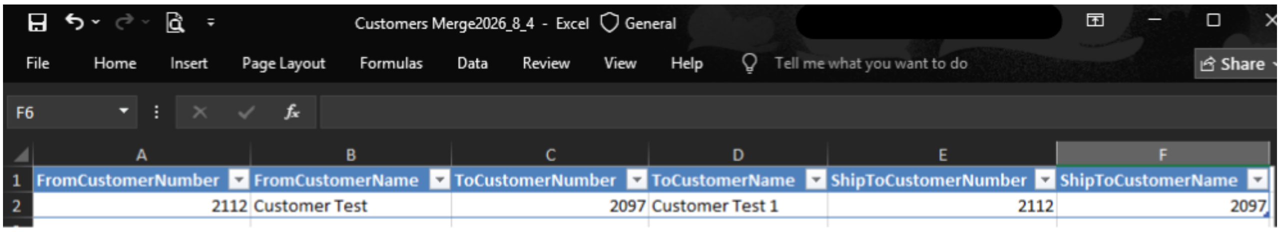
Instead of merging customers individually, you can upload an Excel file containing the customer merge information.

Step 1. Prepare the Import File

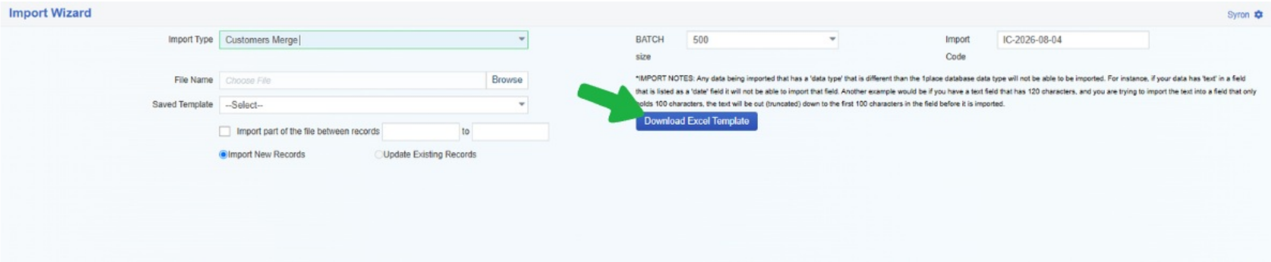
Create an Excel file containing the following columns:

- FromCustomerNumber
- FromCustomerName
- ToCustomerNumber
- ToCustomerName
- ShipToCustomerNumber
- ShipToCustomerName

Each row represents one customer merge.



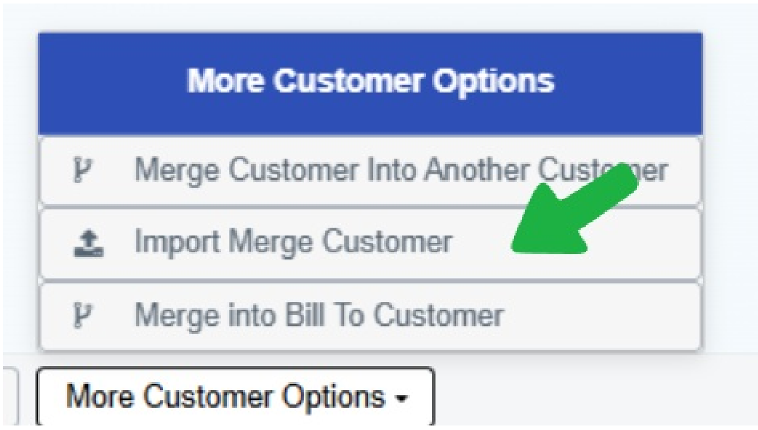
You can download the template on the Import Wizard Screen by clicking the Download Excel Template Button



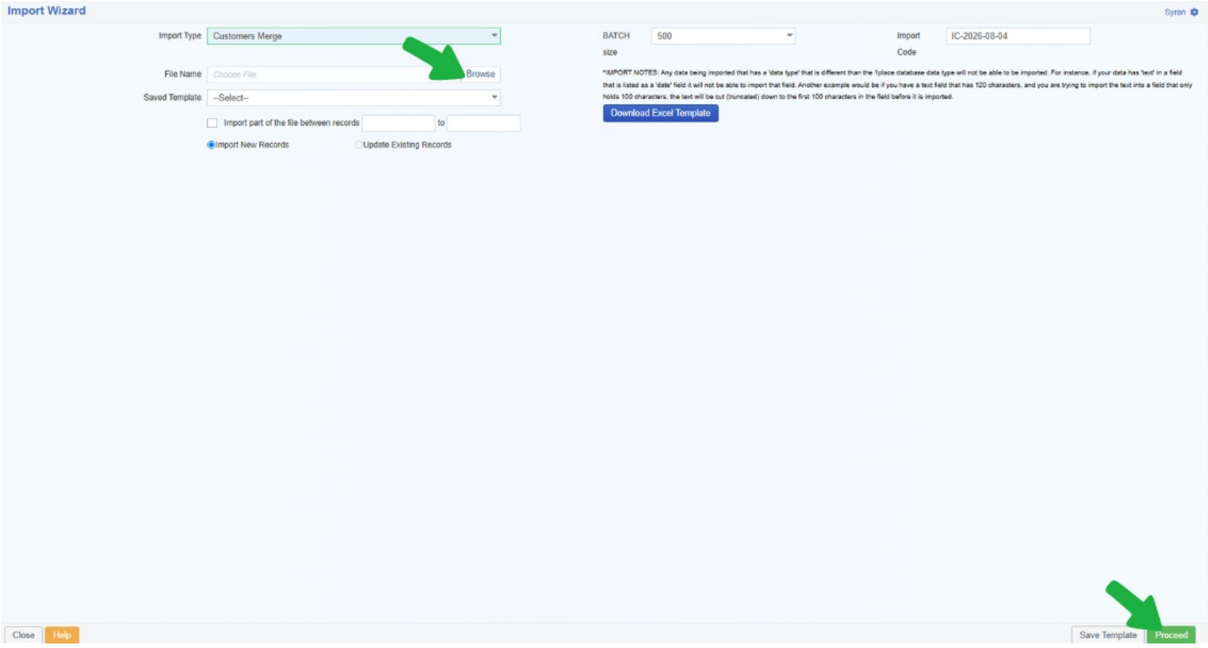
- **From Customer** identifies the customer record that will be merged and deleted.
- **To Customer** identifies the customer record that will receive the transferred records.

Step 2. Import the File

1. Open the **Customer Details** screen.
2. Click **More Customer Options**.
3. Select **Import Merge Customer**.



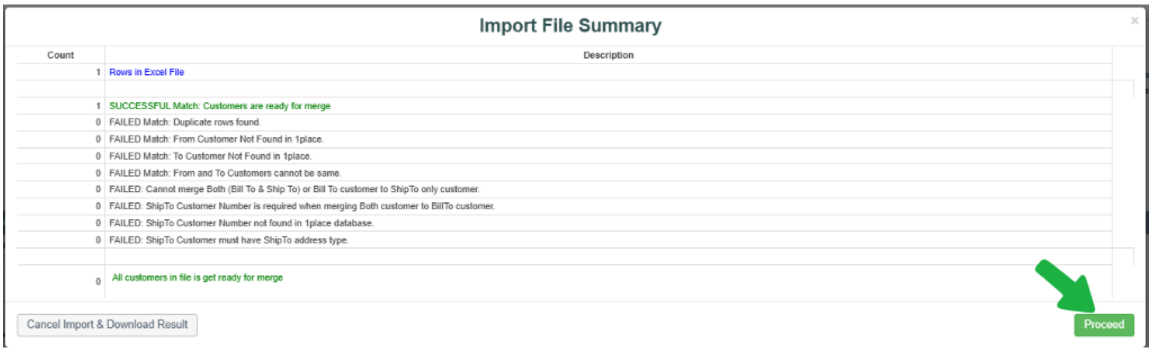
4. Upload the completed Excel file.



5. Click **Proceed** to validate and process the import.

   Once the import has been processed, the **Import File Summary** window will appear, displaying the results of the import.

   - Review the summary to identify any errors or warnings.
   - If issues are found, click **Cancel** and **Download Result** to review the import details and make the necessary corrections.
   - If there are no issues, click **Proceed** to complete the customer merge.



Once the import is completed successfully, each customer listed in the import file will be merged into its corresponding destination customer.

Expected Results

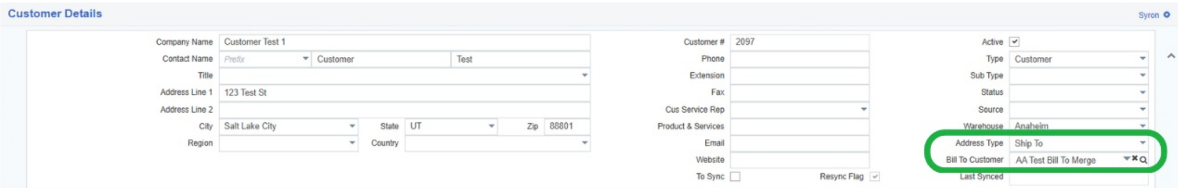
After a successful customer merge:

- All supported customer records are transferred to the destination customer.
- The source customer record is permanently deleted.
- Customer history is consolidated into a single customer record.
- Future transactions should be processed using the destination customer record.

Use **Merge Into Bill-To Customer** when a **Ship-To** customer should be consolidated with its assigned **Bill-To** customer.

Unlike **Merge Customer Into Another Customer**, this option preserves the customer relationship by associating historical sales records with the Bill-To customer while retaining the Ship-To customer information on those transactions.

> **Prerequisites**
>
> Before using this option, ensure that:
> - The customer's **Address Type** is set to **Ship-To**.
> - The customer has an assigned **Bill-To Customer**.

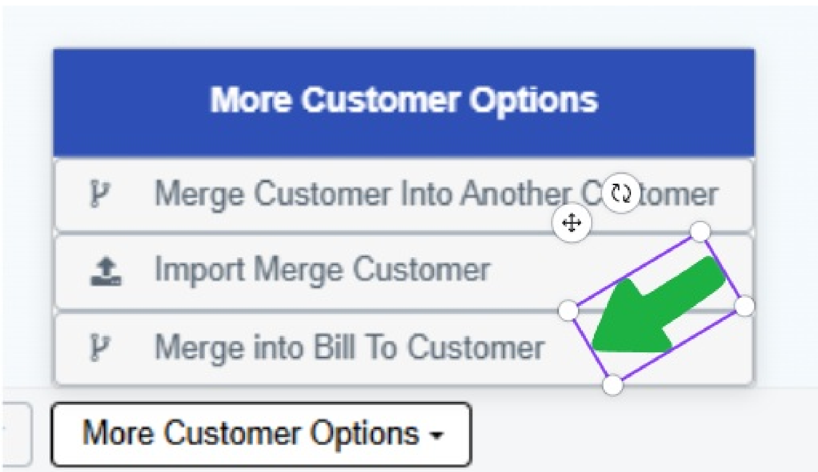


Step 1. Open the Customer Record

1. Open the **Customers** module.
2. Select the **Ship-To** customer you want to merge.
3. On the **Customer Details** screen, click **More Customer Options**.

Step 2. SelectMerge Into Bill-To Customer

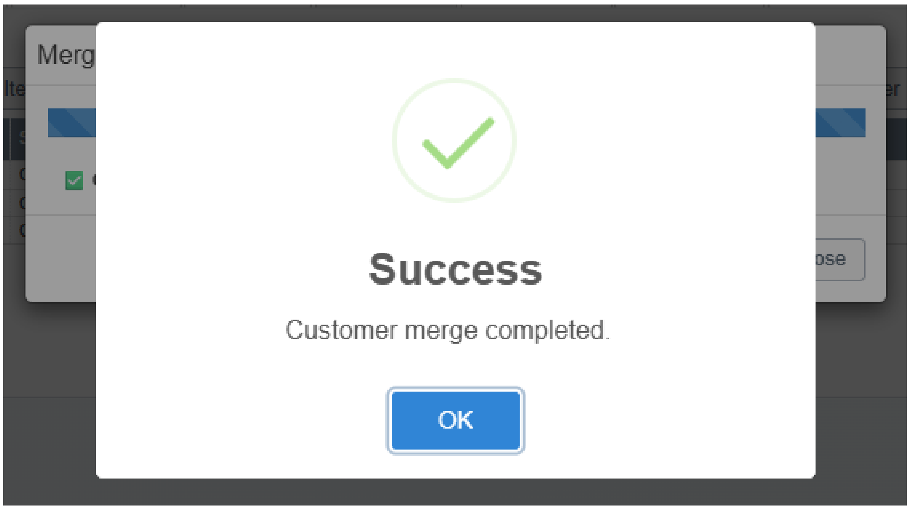
From the **More Customer Options** menu, click **Merge Into Bill-To Customer**.



The system will begin the merge process using the customer's assigned Bill-To customer.

Step 3. Review the Results

Once the merge is completed successfully, a confirmation message is displayed.



Click **OK** to complete the process.

What Happens During the Merge?

When a customer is merged into its Bill-To customer:

- All existing sales records are updated to reference the assigned **Bill-To Customer** as the **Bill-To** customer.
- The merged customer is retained as the **Ship-To Customer** on those sales records.
- This preserves the shipping destination while consolidating billing information under the correct Bill-To customer.

Expected Results

After the merge:

- Historical sales transactions continue to reference the original Ship-To location.
- The assigned Bill-To customer becomes the billing customer for all applicable sales records.
- Customer billing information is consolidated while preserving the shipping history.

1place provides a way to make adding customer records even quicker and more accurate through preset preferences. To do this, click on the **Gear icon** on the top right corner of the screen then select **Settings > Customers.**

- Key in the following information under **New Customer Defaults** to autofill these fields every time you add a new Customer.
  - **Address Type:** Bill To, Ship To or Both
  - **Customer Type:** *Create any Type name.*
  - **Customer Subtype:** *Create any Subtype name.*
  - **Shipped Via:** The shipping method.
  - **Warehouse:** The default warehouse that will be assigned to the new record.
  - **Pricing Method:** The default pricing method (Discount, Multiplier, Markup, Item Price Level)
  - **Pricing Value:**
  - **Custom Pricing Template:** Select from your Pricing Templates (created on **Sales > Pricing Templates).**
  - **Tax Exempt:** Check box if tax exempted.

This is an added (optional) feature that can also help you autofill various data needed on the **Add New Customer or**

Prospects form every time you add a new Customer record. To do this, you must:

- Create and define your own **Customer Default Profiles.** Go to **Settings > Customers > Customer 'Auto Fill' Profiles** then click on the **New** button to add a profile.
- Key in the following information on the **Customer Default Profile popup screen:**
    - **Profile Name:** *Create any name.*
    - **Address Info:** The default City, State, Region and Country of the Customer.
    - **Shipped Via:** The default Shipping method that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
    - **Type:** The default Type of customer or prospect. This is a user definable value to help categorize, group, and classify your records.
    - **SubType:** Similar to the Type, this is a user definable value to help categorize, group, and classify your records.
    - **Tax:** The default Sales Tax code that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
    - **Tax Exempt:** Check the box if exempted from tax. This will activate the '**Reason for Exemption'** text box.
    - **Payment Terms:** The default Payment Terms that will be automatically inserted into new Quotes, Sales Orders, and Invoices for the particular customer.
    - **Payment Methods:** The default Payment Method for the particular customer.
    - **Credit Limit:** The default Credit Limit that will be assigned to the particular customer.
    - **Credit Days:** The default number of Credit Days for the particular customer.
    - **Default Pricing Method:** The default method of pricing that will be assigned to the particular customer.
    - **Warehouse:** The default warehouse for the particular customer.
    - **Pricing Template:** Select from your Pricing Templates (created on **Sales > Pricing Templates).**
    - **Sync with QuickBooks Online:** Check the box to automatically sync Customers (tagged under this Default Profile) with QuickBooks Online.
- Note: You can create an unlimited number of profiles.
- Now that you have created your **Customer 'Auto Fill' Profiles,** you may use these profiles to add new Customer records faster and more accurately.
    - **On the Add New Customer or Prospects screen (when adding a new Customer)** select the Customer Default Profile Name from the **Auto Fill Profile** drop down list. All entered default settings (above) related to the selected profile will be automatically filled.

- Open the Ship To Customer record.
- Click on the **Link To drop down** icon (located on the **Main Fields** section of the **Customer Details** screen, upper right corner just below the **Address Type box)**.
- Select the **Bill To Company** (from the drop down list) where you want it to be linked.
- Click **Save**.