Customer: Add New Screen

Last Modified on 08/19/2026 11:04 pm EDT

Data Input for Add New Customer or Prospects Screen

- **Auto Fill Profile** - This is a helpful feature to automize filling in the data to save your time. When you select a profile from the dropdown list, the boxes are automatically filled in with data in one click depending on what you have preset in Settings.
    - Note: To Preset **Auto Fill Profiles**, just click on the '**New**' button on **Settings>Customers>Customer 'Auto Fill' Profiles**. Provide the following data on the **Customer Default Profile** popup screen::
        - **Profile Name**
        - **Address Info**
        - **Shipped Via**
        - **Type**
        - **Sub Type**
        - **Tax**
        - **Tax Exempt (box)**
        - **Payment Terms/Methods**
        - **Credit Limit/Days**
        - **DefaultPricing Method**
        - **Warehouse**
        - **Pricing Template**
        - **Sync With QuickbooksOnline (box)** - Check this box to enable syncing with QuickBoooks Online.
- **Customer #** - This is a required number code autogenerated everytime you add a new customer.
- **Company Name** - Name of Company/Business or Individual Customer
- **Address Type** - Choose froom the **dropdown** list if:
    - **Bill To** - The party to whome Invoice is billed, or
    - **Ship To** - The party actually receiving the item delivery, or
    - **Both (bill To & Ship To)**
- **Contact Name** - Customer Representative / Contact Person
- **Title** - Position/Designation of Company Representative
- **Address Info**
- **Phone & Fax**
- **Email & Website** -Company email of the contact person & Company website.
- **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** - Categorization of customers by activity.
- **Source** - Indicates info about where/how you found this customer.
- **Shipped Via** - Shipping method.
- **Warehouse** - The default warehouse for the particular Customer.
- **Sales Tax** - Select (from the drop down list) the Sales Tax %. Note: The Sales Tax % settings are defined at Settings (gear icon, top right) > Sales >Sales Taxes.
- **Tax Exempt** - Put a check in the box if exempted from tax.

    - **Reason for exemption**
- **Tax Resale #**
- **Payment Terms** - Payment terms and conditions you set as the seller. Note: To pre-define your Payment Terms settings, go to **Settings>Sales>General Sales Settings>Payment terms (section)**.
- **Payment Method** - Note: If Payment Method is not on the dropdown list, just type it on the field and click 'Yes, add it!' button on the pop-up message. You can also go to **Settings>Sales>General Sales Settings>Payment method (section)** to add or delete anything on the list.
- **Default Pricing Method** - When you select a particular Default Pricing Method (e.g. Discount, Markup, Multiplier, Item Price Level, Item List Price), the item price will be calculated using the method you selected every time you create Sales Transactions.
- **Pricing Level** - Select a default Pricing Level from the list. These are pre-set Price Codes and you can name them any way you like. (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.
- **Pricing Templates -** When you select a Pricing Template from the **dropdown** list, it automatically overrides the **Default Pricing Method** selected.
- **Sales Rep** - Your Customer Service Representative