Customer: Add New Screen

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Overview

The Add New Customer screen is used to create a new customer record in 1place.

When adding a customer, you can enter and configure:

- Basic customer and contact information
- Customer classification
- Shipping and warehouse settings
- Tax information
- Payment terms and methods
- Pricing settings
- Assigned sales representative

To make the process faster, 1place also provides Auto Fill Profiles, which allow commonly used customer information to be automatically populated when creating a new customer.

Help Topics

- **Understanding the Add New Customer Screen**
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  - Customer Classification
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  - Tax Information
  - Payment Information
  - Pricing Information
  - Sales Representative
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Understanding the Add New Customer Screen

The Add New Customer screen contains the information needed to create a complete customer record. The available fields are organized into several areas, including customer information, classification, shipping, tax, payment, and pricing.

Customer Information

- Customer # - The customer number is required and is automatically generated when a new customer is created.
- Company Name - The name of the company, business, or individual customer.
- Address Type - Determines whether the customer is a Bill To, Ship To, or Both.
  - Bill To - The party who is billed for the invoice.
  - Ship To - The party who receives the items.
  - Both - The customer is both the Bill-To and Ship-To party.
- Contact Name - The customer's primary contact person.
- Title - The contact person's position or designation.
- Address Info - The customer's address information.
- Phone - The customer's phone number.
- Fax - The customer's fax number.
- Email - The customer's email address.
- Website - The customer's company website.

Customer Classification

- Type - A user-defined value used to categorize customers.
- Sub Type - A user-defined value used for additional customer classification.
- Status - The customer's current status.
- Source - Indicates where or how the customer was acquired or identified.

Shipping and Warehouse Settings

- Shipped Via - The customer's default shipping method.
- Warehouse - The customer's default warehouse.

Tax Information

- Sales Tax - The customer's applicable sales tax rate.
    - Note: Sales Tax rates can be configured under Settings > Sales > Sales Taxes.
- Tax Exempt - Indicates that the customer is exempt from sales tax.
- Reason for Exemption - The reason the customer is exempt from sales tax.
- Tax Resale # - The customer's tax resale number.

Payment Information

- Payment Terms - The customer's payment terms.
    - Note: Payment Terms can be configured under Settings > Sales > General Sales Settings > Payment Terms.
- Payment Method - The customer's default payment method.
    - If the required payment method is not available in the dropdown list, type it into the field and click Yes, add it! when prompted.
    - Payment Methods can also be managed under Settings > Sales > General Sales Settings > Payment Method.

Pricing Information

- Default Pricing Method - The default method used to calculate the customer's item prices. Available options include Discount, Markup, Multiplier, Item Price Level, and Item List Price.
- Pricing Level - The customer's default Pricing Level.
    - Note: Pricing Levels can be configured under Settings > Item Settings > Item Pricing Levels. Click Save after making changes.
- Pricing Template - A predefined pricing configuration assigned to the customer.
    - Note: A selected Pricing Template overrides the Default Pricing Method.

Sales Representative

- Sales Rep - The sales representative assigned to the customer.

Auto Fill Profiles

Auto Fill Profiles allow you to create predefined customer settings and apply them when adding a new customer. This can reduce repetitive data entry and help ensure that commonly used customer settings are applied consistently.

How to Set Up Auto Fill Profiles

1. Go to Settings > Customers > Customer 'Auto Fill' Profiles.
2. Click New.
3. On the Customer Default Profile popup screen, enter the default information for the profile:
    - Profile Name
    - Address Info
    - Shipped Via
    - Type
    - Sub Type
    - Tax
    - Tax Exempt
    - Payment Terms
    - Payment Methods
    - Credit Limit
    - Credit Days
    - Default Pricing Method
    - Warehouse
    - Pricing Template

- Sync With QuickBooks Online - Select this option to enable syncing with QuickBooks Online.

4. Save the profile.

Once created, the profile will be available in the Auto Fill Profile dropdown on the Add New Customer screen.

How to Use an Auto Fill Profile When Adding a Customer

1. Open the Add New Customer screen.

2. Select the appropriate profile from the Auto Fill Profile dropdown.

3. The fields configured in the selected profile will automatically populate.

4. Review the populated information and enter or update any remaining customer information.

5. Save the customer record.
