Customer Detail Screen - How To's

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Overview

The **Customer Details** screen provides a central location for viewing and managing information related to a customer. From this screen, users can manage customer information, contacts, pricing, sales history, tasks, documents, customer settings, and other customer-related records.

The Customer Details screen is organized into:

- **Main Fields** - Contains the customer's primary information, such as company name, address, contact information, customer number, warehouse, sales representative, and customer status.
- **Tabs** - Provides access to additional customer information and related records.
- **Footer Actions** - Provides options to create, save, delete, close, or get help for the customer record.

The Customer Details screen also provides access to additional customer options, such as **merging customer records** and linking Ship-To customers to Bill-To customers.

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Overview of the Customer Details Screen

The **Customer Details** screen is the central location for managing information associated with a customer.

The screen is divided into three main areas:

Main Fields

The **Main Fields** section contains the customer's primary information, including:

- Company and contact information
- Address information
- Customer number
- Phone and email information
- Customer Service Representative
- Customer Type and Sub Type
- Customer Status
- Default Warehouse
- Address Type
- QuickBooks Online synchronization information
- Other customer-specific settings

Customer Details Tabs

The tabs provide access to additional information and records related to the customer, including:

- Dashboard
- Contacts
- Tasks
- Jobs
- Pricing
- Settings
- Sales History
- Marketing Info
- Notes
- Document Management
- Audit Log
- Customer Portal
- API

The available tabs may vary depending on the configuration of the Customer Details screen.

Footer Actions

The buttons at the bottom of the Customer Details screen allow you to perform common actions:

- **New** - Create a new customer record.
- **Delete** - Delete the current customer record.
- **Save** - Save changes made to the customer record.
- **Help** - Open help resources related to the Customer Details screen.
- **Close** - Close the Customer Details screen.

Accessing and Finding Customer Records

How to Find a Customer Record

You can access a specific customer record using several methods:

- Press **F3**.
- From the **Quick Start Menu**, click the **Search** (magnifying glass) icon and select **Customers**.
- From the **Customer List** screen, use the **Search** feature to search by company name or other available information.
- From a **Sales Order** screen, click the **Magnifying Glass** button next to the **Bill To** or **Ship To** fields.

How to Find a List of Customers

To access the Customer List:

- Press **Shift + F3**, or
- From the **Quick Start Menu**, click **List** and select **Customers**, or
- From the **Main Menu Bar**, click **Customers**.

How to Find Customers by Specific Criteria

The Customer Search feature allows you to filter customers using different criteria.

1. Open the **Customer Search** screen.

2. Click the **Search By** drop-down.

3. Select the information you want to search by.

Available criteria include:

- First Name
- Last Name
- Company Name
- Customer Number
- Phone
- Address

- State
- Zip Code
- Region
- Fax
- Sales Rep
- Address Type

You can also use the **Search By** field to perform a multi-search across the available customer information.

Managing Customer Records

How to Add a New Customer Record

There are several ways to create a new customer:

- Press **Ctrl + F3**.
- From the **Quick Start Menu**, click the **+** icon and select **Customer**.
- From the **Customer List** or **Customer Details** screen, click **New**.
- From a **Sales Order**, when entering a Bill-To or Ship-To customer that does not exist, select **+ Add New** from the customer drop-down list.

Enter the required customer information and save the record.

How to Edit a Customer Record

To edit an existing customer:

1. Open the customer's **Customer Details** screen.
2. Make the necessary changes.
3. Click **Save**.

You can also edit a customer directly from the **Customer List** by clicking the **Edit** button and making the necessary changes.

How to Delete Customer Records

Customer records can be deleted from the **Customer List**.

1. Select the customer record or records using the checkboxes.
2. Click **Batch Actions**.
3. Select **Delete Selected**.
4. Confirm the deletion when prompted.

You can also use the checkbox at the top of the list to select all records on the current page or the entire list.

> **Note:** Customer records that are associated with sales transactions or other related data may not be eligible for deletion. This restriction helps preserve the integrity of customer and transaction history.

Managing Customer Contacts

How to Add a Customer Contact

A customer can have multiple contact records.

1. Open the customer's **Customer Details** screen.
2. Click the **Contacts** tab.
3. Enter the contact information in the next available blank row.
4. Click **Commit Contact**.
5. Click **Save**.

How to Edit a Customer Contact

1. Open the **Contacts** tab.
2. Locate the contact.
3. Click the **Edit** icon under the **Action** column.
4. Make the necessary changes.
5. Click **Save**.

How to Delete a Customer Contact

1. Locate the contact on the **Contacts** tab.
2. Click the **X** icon under the **Action** column.
3. Click **Yes** to confirm.

How to Create a Task for a Contact

From the **Contacts** tab:

1. Locate the contact.
2. Click the **Add New Task** icon under the **Action** column.
3. Enter the task details.
4. Click **Save**.

You can also right-click the contact record and select **Add New Task**.

How to Email a Customer Contact

1. Open the **Contacts** tab.
2. Right-click the contact.
3. Select **Send Email**.

Managing Customer Tasks

How to View Customer Tasks

1. Open the customer record.
2. Click the **Tasks** tab.
3. Use the **Search** filter to locate a specific task.

How to Create a Customer Task

1. Open the customer's **Tasks** tab.
2. Click **New Task**.
3. Enter the required task information.
4. Click **Save**.

You can also right-click a task record and select **Add New Task**.

How to Edit a Customer Task

You can edit an existing task by either:

- Right-clicking the task and selecting **Edit Task**, or

- Clicking the **Edit** icon under the **Action** column.

Make the necessary changes and click **Save**.

How to Configure Customer Task Preferences

Task-related preferences can be configured from:

Gear Icon > Settings > Tasks

These settings include options for:

- Prompting users when completing a task on a different date.
- Prompting users to schedule a follow-up task.
- Automatically creating tasks from emails using a designated email subject prefix.

Managing Customer Jobs

The **Jobs** tab displays jobs associated with the customer.

The Jobs list can include information such as:

- Job ID
- Group
- Priority
- Original Date
- Description
- Status
- Type
- Sub Type
- Expected Date
- Company
- Assigned To
- From Email
- Import Code
- Action

How to View a Customer Job

1. Open the customer's **Customer Details** screen.

2. Click the **Jobs** tab.

3. Locate the job you want to view.

4. Click the **Magnifying Glass** icon under **Actions**.

How to Delete a Customer Job

1. Locate the job in the **Jobs** tab.
2. Click the **X** icon under **Actions**.
3. Confirm the deletion.

How to Search Customer Jobs

Use the **Search** filter above the Jobs table to search across the available job information.

You can also use the gear icon above the table to show or hide available columns.

Managing Customer Pricing

The **Pricing** tab allows you to define how pricing is calculated for a specific customer.

Customer pricing can be established using:

- A default pricing method
- Custom Pricing Templates
- Pricing Categories
- Specific Items
- Price Levels
- Discounts
- Markups
- Multipliers
- Specific Prices
- Quantity-based pricing

How to Set a Customer's Default Pricing Method

From the customer's **Pricing** tab, select the appropriate option from the **Default Pricing Method** drop-down.

Available methods include:

- Discount off Item List Price
- Multiplier off Item List Price
- Markup above Item Cost
- Item Price Level

How to Add a Custom Pricing Template

1. Open the customer's **Pricing** tab.
2. Click the **Add Custom Pricing Template** drop-down.

3. Select the desired pricing template.

4. Click **Go**.

The pricing settings from the selected template will be added to the customer's Custom Prices table.

How to Add Pricing Categories or Specific Items

You can further customize customer pricing by adding:

- **Pricing Categories** - Applies the pricing rule to items belonging to the selected category.
- **Specific Items** - Applies the pricing rule to a particular item.

Pricing entered in the Custom Prices table takes priority over the customer's default pricing method.

How to Lock a Customer Price

A price added through a Pricing Template can be changed and then locked so that future mass updates to the Pricing Template do not overwrite the customer-specific price.

1. Locate the pricing row.

2. Click the **Open Padlock** icon under **Actions**.

3. Click **Yes** on the confirmation prompt.

The icon changes to a **Closed Padlock**, indicating that the price is locked.

How Customer Pricing Takes Priority

When pricing is configured at multiple levels, **Specific Item** pricing takes priority over **Pricing Category** pricing.

For example, if an item belongs to a Pricing Category with one pricing rule but also has a separate Specific Item pricing rule, the Specific Item pricing rule takes precedence.

> **Note:** You cannot apply two or more pricing methods to the same pricing row.

Managing Customer Settings

The **Settings** tab contains default sales, shipping, tax, payment, and credit information for the customer.

Settings include:

- Shipped Via
- Sales Tax
- Tax Exempt
- Federal Tax ID

- Payment Terms
- Payment Method
- Sales Rep
- Credit Limit
- Credit Days
- Current Balance
- COD
- Credit Hold
- Admin Credit Hold

How to Set Customer Shipping and Tax Defaults

From the **Settings** tab:

1. Select the appropriate **Shipped Via** option.

2. Select the customer's **Sales Tax** rate.

3. If applicable, check **Tax Exempt** and enter the **Reason for Exemption**.

4. Enter the customer's **Federal Tax ID**, if applicable.

5. Save the customer record.

How to Set Customer Payment Terms and Payment Method

1. Open the customer's **Settings** tab.

2. Select the appropriate **Payment Terms**.

3. Select the customer's **Payment Method**.

4. Click **Save**.

How to Manage Customer Credit Settings

The customer's credit-related settings can be managed from the **Settings** tab.

These include:

- **Credit Limit** - Maximum credit extended to the customer.
- **Credit Days** - Allowed time between the purchase and payment due date.
- **Current Balance** - Total unpaid balance against the customer's credit.
- **COD** - Identifies the customer as Cash On Delivery.
- **Credit Hold** - Indicates that the customer's credit is currently on hold.
- **Admin Credit Hold** - Indicates that an administrative credit hold has been placed on the customer.

Viewing Customer Sales History

The **Sales History** tab provides access to historical transactions associated with the customer.

You can view:
- Quotations
- Quotation Line Items
- Transaction Ledger
- Sales Orders
- Sales Order Line Items
- Invoices/Credit Memos
- Invoice/Credit Memo Line Items
- Invoice Payments

Select the appropriate sub-tab and click the related transaction to open its details.

Managing Customer Marketing Information

The **Marketing Info** tab stores marketing and customer-contact information.

Information that can be recorded includes:
- Source
- SIC Code
- Number of Employees
- Campaign information
- Contact dates
- Contacted By
- Contact methods
- Contact results
- Next contact information

This information can be used to track marketing activities and customer interactions.

Adding and Managing Customer Notes

The **Notes** tab allows you to store multiple types of notes related to a customer.

Available Note Types include:
- Order Entry/Sales Notes
- AR Notes
- Internal Notes
- Delivery Notes

To add a note:

1. Open the **Notes** tab.

2. Select the **Note Type**.

3. Enter the note in the text area.

4. Click **Save**.

Managing Customer Documents

The **Document Management** tab allows you to store documents associated with a customer.

How to Add a Customer Document

1. Open the **Document Management** tab.

2. Click **Add New Document**.

3. Enter the **Document Name**.

4. Select the **Document Type**.

5. Click **Create**.

Use the **Search** filter to locate documents associated with the customer.

Viewing the Customer Audit Log

The **Audit Log** records changes made to the Customer Details screen.

The log includes:
- **Updated By** - User who made the change.
- **Date** - Date and time of the change.
- **Item Number** - Related inventory item, when applicable.
- **Change Type** - Type of change made.
- **Column Name** - Field that was changed.
- **Old Value** - Value before the change.
- **New Value** - Value after the change.

Linking Customers to Third-Party Customer IDs

The **API** tab can be used to associate a 1place customer with the corresponding customer ID used by a third-party integration.

For example, a customer may have one customer number in 1place and a different customer ID in **CCC True**. The API tab allows the third-party customer ID to be associated with the 1place customer record.

How to Add a Third-Party Customer ID

1. Open the customer's **Customer Details** screen.
2. Click the **API** tab.
3. Under **Third Party Type**, select the applicable integration.
4. Enter the customer's third-party ID under **Third Party Customer ID**.
5. Repeat for other customer records as needed.

Generating Customer Reports

How to Create and Run a Customer Report

1. From the **Main Menu Bar**, go to **Reports > Customers**.
2. Define the report criteria.
3. Select the customer or choose to include all customers.
4. Select the appropriate **Group By** option.
5. If needed, add a **Report Period**.
6. Click **Run Report**.

The report can be further customized using the **Gear** icon to show or hide columns.

How to Customize and Save a Customer Report

After running the report:

1. Click **Customize**.
2. Enter a **Report Name**.
3. Enter a **Report Description**, if needed.
4. Select the appropriate **Minimum Access Level**, if applicable.
5. Choose whether to make the report **Private** or mark it as a **Favorite**.

6. Select the columns you want displayed.

7. Click **Save**.

Saved custom reports can be managed from **Reports > Custom Reports**.

How to Print, Email, or Download Customer Reports

After generating a report, use the available options to:

- **Download** a copy of the report.
- **Email** a copy of the report.
- **Print** the report.

Merging Customer Records

The **Merge Customers** feature allows you to consolidate customer records while preserving related customer and transaction history.

1place provides several merge options:

- **Merge Customer Into Another Customer** - Transfers related records to another customer and permanently deletes the original customer.
- **Import Merge Customer** - Allows multiple customer merges to be processed using an Excel file.
- **Merge Into Bill-To Customer** - Consolidates a Ship-To customer's sales information with its assigned Bill-To customer while retaining the Ship-To relationship on applicable transactions.

> **Important:** Customer merge operations can permanently modify customer records. Verify the selected customers before proceeding.

How to Access the Merge Customer Options

1. Open the **Customers** module.

2. Open the customer record.

3. Click **More Customer Options** in the lower-left corner of the Customer Details screen.

4. Select the appropriate merge option.

How to Merge One Customer Into Another Customer

Use this option when one customer record needs to be consolidated into another existing customer.

Step 1 - Select the Destination Customer

1. Open the customer that you want to merge.

2. Click **More Customer Options**.
3. Select **Merge Customer Into Another Customer**.
4. Select the destination customer.
5. Click **Merge into Selected Customer**.

Step 2 - Confirm the Merge

A confirmation window will appear.

1. Type **Merge** into the confirmation field.
2. Click **OK**.

The following related records can be transferred:

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

After the merge is completed, the original customer record is permanently deleted.

How to Import Customer Merges in Bulk

Use **Import Merge Customer** when multiple customer records need to be merged.

Step 1 - Prepare the Import File

Create an Excel file containing the required customer mapping information:

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

Each row represents a customer merge.

The import template can be downloaded from the **Import Wizard** screen.

Step 2 - Import the Customer Merge 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**.

The **Import File Summary** window will display the results.

Review the summary for errors or warnings.

- If issues are found, click **Cancel** and **Download Result** to review the errors and make corrections.
- If there are no issues, click **Proceed** to complete the merge.

How to Merge a Customer Into Its Bill-To Customer

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

Before You Begin

Make sure:

- The customer's **Address Type** is set to **Ship-To**.
- The customer has an assigned **Bill-To Customer**.

Step 1 - Open the Ship-To Customer

1. Open the **Customers** module.
2. Select the Ship-To customer.
3. Click **More Customer Options**.

Step 2 - Select Merge Into Bill-To Customer

Click **Merge Into Bill-To Customer**.

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

Step 3 - Review the Results

After the merge is completed, a confirmation message will appear.

Click **OK**.

The applicable sales records will be updated so that:
- The assigned Bill-To customer becomes the billing customer.
- The original Ship-To customer remains associated with the transaction as the shipping destination.
- Historical shipping information is preserved.

Configuring Customer Settings

Customer defaults can be configured to make creating new customer records faster and more consistent.

To access these settings, go to:

Gear Icon > Settings > Customers

How to Set New Customer Defaults

The **New Customer Defaults** settings allow you to automatically populate selected fields whenever a new customer is created.

Available defaults include:
- Address Type
- Customer Type
- Customer Subtype
- Shipped Via
- Warehouse
- Pricing Method
- Pricing Value
- Custom Pricing Template
- Tax Exempt

How to Create Customer Auto Fill Profiles

Customer Auto Fill Profiles provide another way to automatically populate customer information when creating a new customer.

1. Go to **Gear Icon > Settings > Customers > Customer Auto Fill Profiles**.

2. Click **New**.

3. Enter the **Profile Name**.

4. Configure the default customer information.

5. Click **Save**.

Profiles can include defaults for:
- Address information
- Shipped Via
- Customer Type and SubType

- Tax
- Tax Exempt
- Payment Terms
- Payment Methods
- Credit Limit
- Credit Days
- Default Pricing Method
- Warehouse
- Pricing Template
- QuickBooks Online synchronization

Once a profile has been created, select it from the **Auto Fill Profile** drop-down when creating a new customer.

Linking a Ship-To Customer to a Bill-To Customer

You can manually associate a Ship-To customer with a Bill-To customer from the Customer Details screen.

1. Open the **Ship-To Customer** record.
2. Locate the **Link To** drop-down in the Main Fields section.
3. Select the appropriate **Bill-To Company**.
4. Click **Save**.

This establishes the Bill-To relationship for the Ship-To customer.
