Adding and Editing Customer Records in Accounts Receivable

In the Add/Edit Customers window, you can easily access and manage your customers' information. In this window, you can add new customers, edit existing customers' information, delete customers, print a customer listing, and import individual information from People, Organizations, or HeadMaster if you own these modules.

The **Customer** and **Family** tabs in this window let you view your customer listing by individual customers or by family name. Select **Show Inactive** to view all customers.

1. Under Manage Records, click the **Records** tab.
2. In the drop-down list, select **Add/Edit Customers** and click **Go** .
3. Click **Add**.
4. In the **Code** field, enter the customer's code. To use the next available code, click **Next**.
5. In the **Last Name** field, click **Lookup** to verify if the individual is in your Global Name List. If the customer was entered into the database as an individual, his or her record is accessible through the Global Name List. Make sure to select the **Show Inactive** check box.
6. If the individual is in your Global Name List, select the record and skip to the last step. Otherwise, enter the appropriate information in the **Name Information** fields.

   Note

   If the Name Information that you enter already exists in the database, you are prompted to continue adding the record, select the existing record, or cancel adding the record. This prevents you from entering duplicate records.
7. Enter the necessary information on the remaining tabs to complete the customer's record.

You can also view and edit a customer's information.

1. Under Manage Records, click the **Records** tab.
2. In the drop-down list, select **Add/Edit Customers** and click **Go** .
3. On the **Customer** tab, select the customer whose information you want to edit. Click **Edit**.
4. Click on the tab that you want to edit and enter the revised information in the appropriate fields.