Adding Family Records in Accounts Receivable

In the Add/Edit Customers window, you can easily access and manage information for your customers and their families.

You can add new customers or families, edit existing customers' information, delete customers, print a customer listing, and import individual information from People, Organizations, or HeadMaster if you have purchased 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.

Note

The Family tab only displays if **Track Family Records** is selected on the AR Setup Tab.

1. Under Manage Records, click the **Records** tab.
2. In the drop-down list, select **Add/Edit Customers**. Click **Go**.
3. On the **Family** tab, click **Add**.
4. Enter the family's **Name Information** in the **Name** field. The customer's **Mail Name** automatically displays when you click in that field, but you can edit it.
5. Select the appropriate options in the **Receive Statement**, **Charge Late Fees**, and **Active** check boxes.
6. On the **Members** tab, click **Add**. You must add each family member to the family.
7. In the **Code** field, enter the customer's code. To use the next available code, click **Next**.
8. If the customer exists in the database, click **Lookup** to select the customer's record and skip to the last step. Make sure to select the **Show Inactive** check box. If the customer does not have a record in the database, enter the appropriate information in the **Name Information** fields.

   Note

   If the Name Information that you enter already exists in the database, the system prompts you to continue adding the record, select the existing record, or cancel adding the record. This prevents you from entering duplicate records into the database.

- Enter the necessary information on the remaining tabs to complete the customer's record.
- After adding the first family member, repeat the process to add each additional family member. After adding all family members, click **OK**. Each family member is added to the Global Name List automatically when you add them to a family record.

Additional Field Information
Receive Statement Select if the family will receive statements. **Charge Late Fees** Select if you will charge late fees to the family. **Active** Select if the customer is an active customer. Clearing this option deactivates the customer. **Date of Last Activity** When payments are posted, the check date displays in this field. You cannot delete customers if they have a balance or activity within the last 12 posting periods.