Creating a New Customer

Last Modified on 04/15/2026 11:31 am EDT

A new Customer may be created by choosing one of two paths:

From the main application menu, navigate to the Client Management module, then select the New Customer option or from the main application toolbar, clicking the binoculars icon, and then clicking the New button located at the lower right of the Customer Lookup form.

When creating a new customer, enter this information:

- Enter billing information on the Customer Information tab.
- Enter site information on the Site Setup tab.
- Enter system information on the System tab.
- Enter RMR on the RMR tab (optional). Note that not all data entry fields for a new recurring line are available on this tab. You should save the customer, and then add the recurring as a second step.
- Enter custom field information based on your company's policies and procedures. If this tab is not shown, this indicates that your company has not activated the use of Customer Custom Fields in SedonaSetup.

Customer Information Setup

The Customer Information tab of the New Customer Setup form is divided into three sections: Customer Detail, Primary Bill To Information, and Invoice Printing.

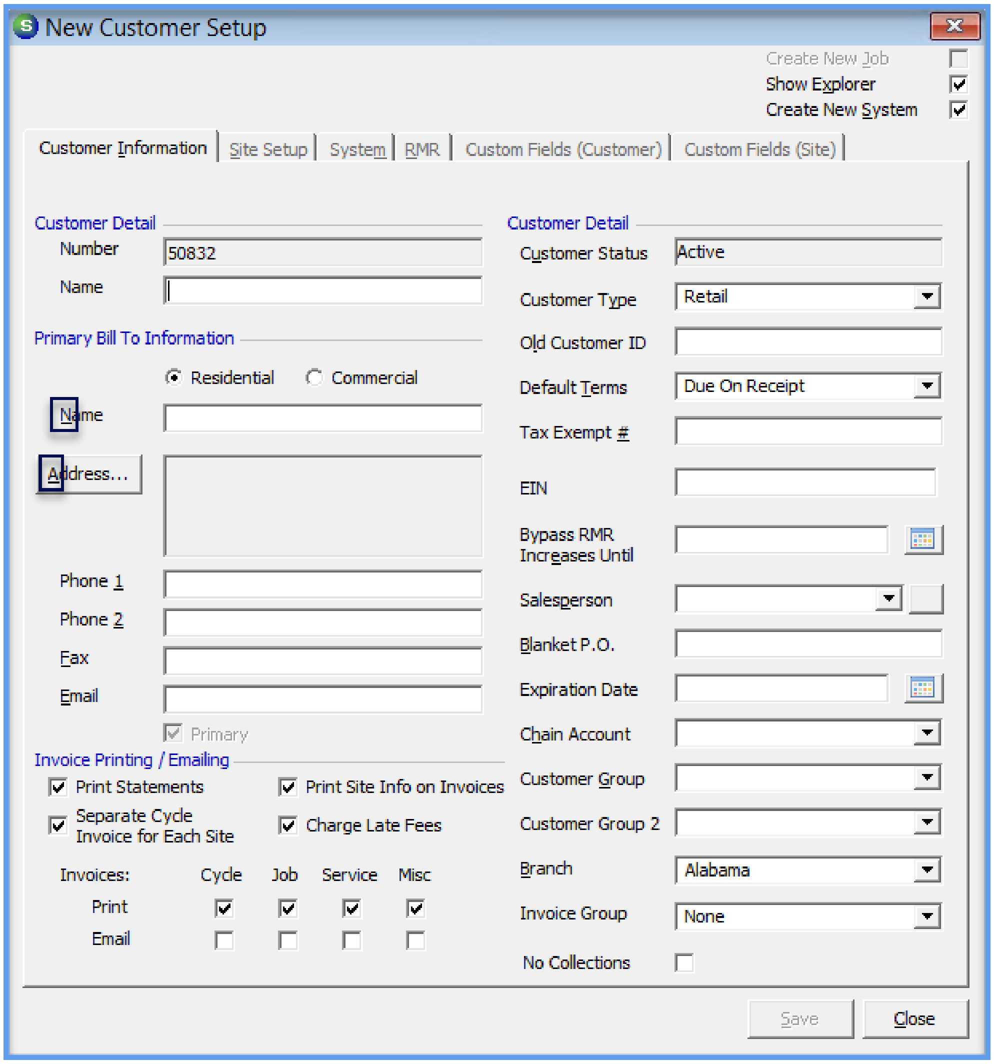
In any data entry field the displays an arrow to the right of the field, make a selection from the drop-down list. In fields without an arrow to the right, enter any information desired as long as the number of characters does not exceed the field limit.

Short-Cut Keys

Pressing the Tab key on the keyboard advances to the next data entry field. Pressing the Shift and Tab keys simultaneously goes back one field. You can also use the mouse to click on the next field to enter information.

There are also accelerator keys assigned to most of the data entry field labels. If a field label has a character that is underlined, pressing ALT+the letter underlined jumps to that field. For example in the Name field, the accelerator key is N; to jump to that field from anywhere on this form, press ALT N.

On the New Customer Setup form, make selections in the required fields and other optional fields according to your company's policy and procedures.



Important Note: When setting up the customer's billing information on the Customer Information form, there are fields on this form that are not available when initially setting up the customer. These fields are Invoice Type flags, which allow you to define which types of invoices will use a particular Bill To record. If certain types of invoices are to use a particular billing address, you need to create additional Bill To records and mark which invoice types are to use that billing address as the default. For instructions on creating additional Bill To records, follow this link: Creating Additional Bill To Records.

Customer Information Data Entry Fields

The Customer Information form is divided into several sections: Customer Detail, Primary Bill To Information, and Invoice Printing. Each field in these sections is described below.

Customer Detail

Number: The Customer Number is the main billing account number. The Customer Number is a primary sort feature on many SedonaOffice Reports. Depending on your company's settings, a Customer Number may automatically fill into this field or you need to manually enter a customer number. If your company is manually entering Customer Numbers, the Customer Number can be numeric, alpha-numeric or all alpha characters; up to 15 characters may be entered into this field.

Name: This is the Name by which the customer is known. When searching for a customer record, the Customer Name is a criteria item that can be used to retrieve a customer. A customer Name can contain up to 50 characters.

Customer Status: This field is view only. The SedonaOffice application automatically sets this value. If Recurring Lines are manually created on the account, the Customer Status will automatically change to AR (Active Recurring). If there a no Recurring Lines for the account, the Customer Status will automatically appear as ANR (Active No Recurring).

Customer Type: This field automatically fills in with the default customer type found in SedonaSetup/Data Entry Defaults. You can change the Customer Type by making a selection from the drop-down list by clicking the arrow to the right of the field.

Old Customer ID: An entry in this field is optional if your company has opted not to use SedonaOffice data conversion services and are manually creating customer records and manually entering the Customer Number. If your company has decided to re-number your customers, you can use this field to enter the prior customer number from the legacy software for reference purposes. Customer Lookups will use this field to retrieve customer records. This field can hold 15 characters.

For companies using SedonaOffice data conversion services and if your company has opted to re-number all customer records, your data conversion specialist will automatically fill this field with the customer number from your legacy software system. This is an optional field.

Default Terms: This field automatically fills in with the default Terms code found in SedonaSetup/Data Entry Defaults. You can change the default terms code by making a selection from the drop-down list by clicking the arrow to the right of the field. This terms code will be used on all invoices generated for the customer, and optionally when posting cycle invoices.

Tax Exempt #: If the customer and its site are to be exempt from sales tax on all invoices, enter a value in this field. The Tax Exempt # can contain up to 20 characters. If you enter a value in this field, this same value will automatically default into the Site Tax Exempt # field on the Site Setup form. Any additional sites created for the customer will automatically fill with this same Tax Exempt value. A space, a period, or any character entered into this field will make the customer exempt from sales tax. This is an optional field.

EIN: An EIN is a nine-digit Federal Tax ID number for businesses, tax-exempt organizations and other entities. This is an optional field.

Bypass RMR Increase Until: This date is used by the Company Rate Change program which is used to increase customer recurring lines based on criteria entered by your company within the Rate Change program. The customers Recurring Lines are not be available to increase until the date entered into this field. For example, if the date entered into this field is 6/3/14 and the effective date of the Rate Increase batch is 6/1/14, this customer's Recurring Lines would not be eligible for an increase. There is also a Bypass RMR Increase date available at the recurring line level. Manual Recurring Line increases may be performed on individual Recurring Lines. The Bypass RMR Increase Until date has no impact on a manual increase. This is an optional field.

Salesperson: Select the salesperson responsible for this customer account from the drop-down list by clicking the arrow to the right of the field. The salesperson selected will default into all jobs and invoices created for the customer.

This is an optional field.

Blanket PO: If your customer has issued your company a purchase order that must be referenced on all invoices, type the purchase order number in this field. If an entry is made in this field, the next field, **Expiration Date** is not required but recommended. You can enter up to 50 characters in this field. This is an optional field.

Expiration Date: If a **Blanket PO** number was entered in the previous field, enter a date on which the purchase order will expire. A report is available from the Report Manager (Blanket PO Expiration) to list all blanket purchase orders expiring within a specific period of time.

Chain Account: This field is used to group like customers together that are not financially related. For more detailed information on the use of this field read Manage Chain Accounts. Records must exist in the Chain Account setup table within SedonaSetup to be able to use this field. This is an optional field.

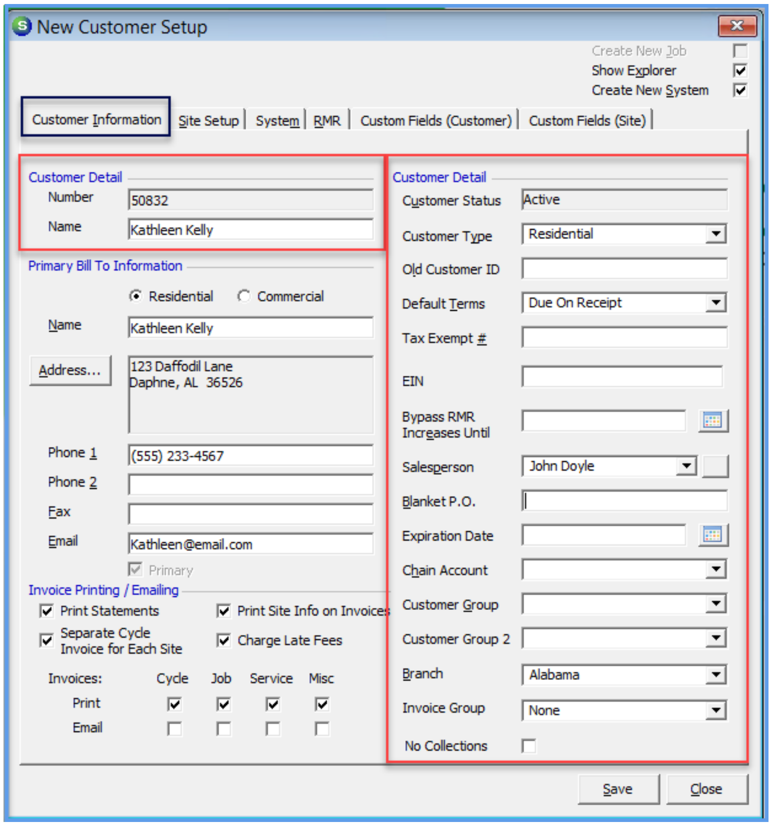
Customer Group: The Customer Group is used to group your customers together so that you are able to apply security within that particular group. For example, if your company has different branch offices, employees can be limited to which customer records they may access depending on the Customer Group associated with the customer record. This additional level of security is activated under the User setup table found in SedonaSetup in conjunction with a setting under Setup Processing for Accounts Receivable within SedonaSetup. A SedonaOffice user can be assigned to one or more Customer Groups. If your company activates this security functionality, every customer must be assigned to a Customer Group.

Customer Group 2: If your company has activated Customer Group Security, select a secondary customer group for the customer.

Branch: This field automatically fills in with the default branch code found in SedonaSetup/Data Entry Defaults. You can change the default branch code by making a selection from the drop-down list by clicking the arrow to the right of the field. This is a required field.

Invoice Group: If you need to separate some recurring lines into various groups to be invoiced at different times, you may create your own groups numbered from 1 to 9. For example, customers that need to be billed in arrears.

No Collections: If this customer is not to be evaluated during the Collection Queue refresh, select this checkbox. If this checkbox is cleared, and the customer meets the rules for any of the collection profiles, the customer will be placed into the appropriate collection queue.



Primary Bill To Information

Residential / Commercial: This field automatically fills in with the default type of customer found in SedonaSetup/Data Entry Defaults. You can change the default type of customer by selecting the appropriate option. This is a required field.

Name: This field automatically fills in name entered in the Customer Detail section. If the name of the customer to whom invoices will be address is different than the name defaulted, you can type in a different billing name. This will become the Primary Bill To record for the customer. If additional Bill To records need to be entered for the customer, these can be added after the new customer record is saved.

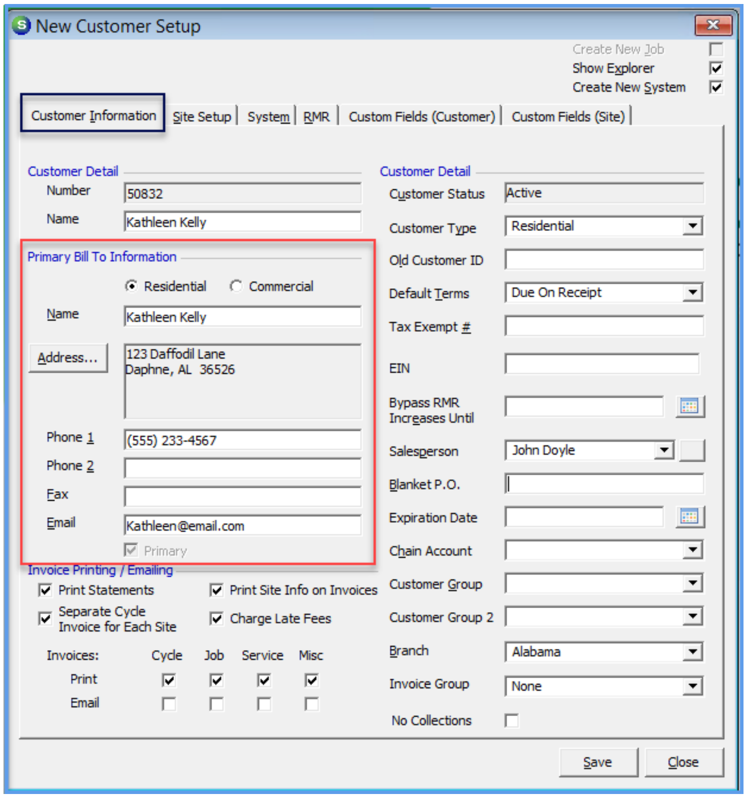
Address: Click the **Address** button to open the form to enter the primary billing address. Enter the address line 1, and then tab down to the Zip Code field and type in the billing zip code. After tabbing off the Zip Code field, the City and State fields are automatically populated. If your company will be entering Counties or Townships, a list of choices must first be created in SedonaSetup/Geographical Tables/United States/County or Township or both. The County and Township fields are optional.

Phone 1: Enter the primary billing phone number for the customer. Type up to 12 digits in this field. If more than 10 digits are entered, the last two digits entered are considered the phone extension. If a phone number is entered with more than 10 digits, it is displayed in the following manner:
A phone number entered as 734555121222 displays as (734) 555-1212 e22. This field is optional.

Phone 2: Enter the secondary billing phone number for the customer. Type up to 12 digits in this field. If more than 10 digits are entered, the last two digits entered are considered the phone extension. If a phone number is entered with more than 10 digits, it is displayed in the following manner: A phone number entered as 734555121222 displays as (734) 555-1212 e22. This field is optional.

Fax: Enter the 10-digit billing fax phone number for the customer. This field is optional.

Email: Enter a valid email address for the primary bill to customer. If your company has purchased the add-on module SedonaEmail (ability to email invoices and statements) or SedonaSync, this email address is used for all emailed invoices and statements. This field is optional unless the Email Invoice option is selected for one or more Invoice Types under Invoice Printing/Emailing.



Invoice Printing

Print Statements: If the customer is to receive printed statements, leave this checkbox selected. If your company will not be sending statements to the customer, clear this checkbox.

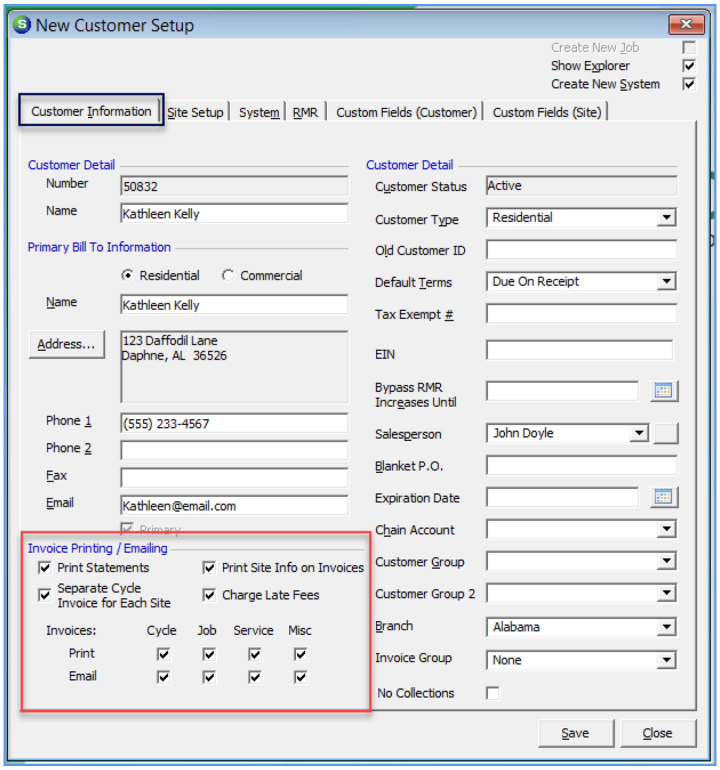
Separate Cycle Invoice for Each Site: If the customer has multiple sites and wants a separate cycle invoice for each site, leave this checkbox selected. If the customer wants a cycle invoice with all the charges for all sites on one invoice, clear this checkbox.

Print Site Info on Invoices: When this checkbox is selected, the following site fields will be printed in the body of the invoice: Site Name, Site Address Line 1, Site City and the Site State. The detailed charge lines on the invoice will print below the Site information. Not all invoice printing forms print the Site Information line.

Charge Late Fees: This option is used by the Finance Charge program, the Statement Generation program, and certain invoice printing forms that incorporate an option to calculate Late Fees. If this checkbox is selected, and the customer is eligible for finance charges or late fees if the customer meets the delinquency rules specified when running the Finance Charges program, Statements program, or when selecting an invoice printing form that has a Late Charge option. If this checkbox is cleared, the customer will not be considered for finance charges or late fees. For more information on finance charges and late fees, refer to the Accounts Receivable module of this help.

Print/Email Invoices: You now have the option to select how Invoices will be sent to Customers. You can select to Print or Email all or some Invoice Types or a combination of both. If Email is selected for at least one Invoice Type then an email address is required in the Primary Bill To section.

Once all information is entered on the Customer Information form, click on the Site Setup tab to enter site related information.



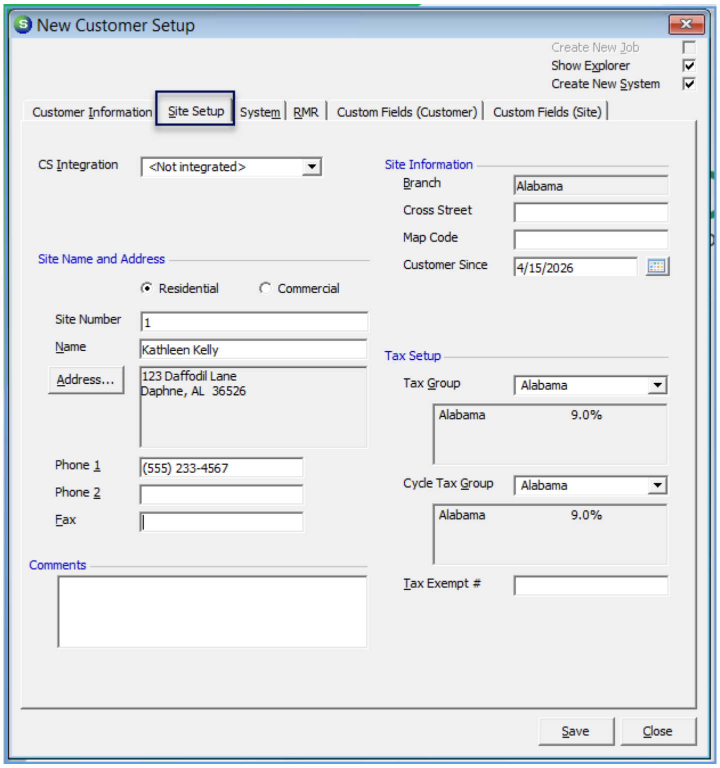
Site Setup

Once all information is entered on the Customer Information form, you will then enter information on the Site Setup form.

After selecting the Site Setup form, make selections in the required fields and other optional fields according to your company's policy and procedures.

The Site Setup form is divided into four sections; Site Name and Address, Comments, Site Information and Tax Setup. Each data entry field is defined under the heading of each section on this form.

In any data entry field which displays an arrow to the right of the field, you must make a selection from the drop-down list. In fields without an arrow to the right, enter any information desired as long as the number of characters does not exceed the field limit. Pressing the Tab key on the keyboard advances to the next data entry field. Pressing the Shift and Tab keys simultaneously moves the cursor back one field. You can also use the mouse to click on the next field to enter information.



The Site Setup form is divided into four sections; Site Name and Address, Comments, Site Information and Tax Setup. Each field in each of these sections is described below.

Site Name and Address

C/S Integration: If your company is using a central station software and will be linking records to SedonaOffice records select the appropriate option from the drop-down menu. Otherwise this field is not required for use.

Site Number: The application automatically defaults to 1 for the first site created for the customer. Any additional sites added to the customer later automatically increment this field by one. The site number can be overridden. For commercial sites, a store number can be entered into this field if applicable. This is an alpha-numeric field that allows the entry of up to 20 characters. This is a required field.

Name: This is the Name by which the site is known. When searching for a customer record, the Site Name is searched if the search option of name is selected. A site name can contain up to 60 characters. The site name prints on service tickets, job tickets, and some reports; enter the site name exactly as it should appear when printed.

Address: The address entered on the Customer Information form automatically fills into the site address. If the site address is different than the bill to address, click the Address button to open the form to modify the site address. If your company will be entering Counties or Townships, a list of choices must first be created in SedonaSetup/Geographical Tables/United States/County or Townshipor both. The County and Township fields are optional.

Phone 1: Type the primary phone number for the site. Type up to 12 digits in this field. If more than 10 digits are entered, the last two digits entered are considered the phone extension. If a phone number is entered with more than 10 digits it is displayed in the following manner:
A phone number entered as 734555121222 displays as (734) 555-1212 e22. This field is optional.

Phone 2: Type the Secondary Phone Number for the Site. Type up to 12 digits in this field. If more than 10 digits are entered, the last two digits entered are considered the phone extension. If a phone number is entered with more than 10 digits it is displayed in the following manner:
A phone number entered as 734555121222 displays as (734) 555-1212 e22. This field is optional.

Fax: Enter the 10-digit billing fax phone number for the site. This field is optional.

Comments

Comments: Information entered into this field displays (but does not print) on the Service Ticket form, and is displayed within the Customer Explorer. Typically important information that is valuable to users managing Service Tickets is entered into this field. This field is optional.

Site Information

Branch: This field automatically fills in with the Branch code that was selected on the Customer Information form. This field cannot be modified. The only time the site branch can be changed is if an additional site is added to the Customer record. This field is required.

Cross Street: This field is for informational purposes only and display and print on service tickets created for the site. Typically the nearest major cross streets to the site is entered into this field. This field is optional.

Map Code: If your company is using map books for locating customers and sites, enter the corresponding page and coordinates for the site, or use this field to track GPS coordinates. This information displays and prints on service tickets created for the Site. This field is optional.

Customer Since: This is the date this customer/site first became your customer. The current date defaults into this field however this date may be changed if necessary. Information entered into this field will display on the Customer Explorer form.

Tax Setup

Tax Group: The Tax Group determines the amount of sales tax that will be applied to invoices created for the Site. This field defaults to the value entered in SedonaSetup/Data Entry Defaults. If the default Tax Group is not the correct selection for the site, make the correct selection from the drop-down list by clicking the arrow to the right of the field. This Tax Group is used for sales tax calculations on Service, Job and Miscellaneous invoice types and credit memos. This is a required field.

Cycle Tax Group: The Cycle Tax Group determines the amount of sales tax that to be applied to Cycle invoices created for the site. This field defaults to the value entered in SedonaSetup/Data Entry Defaults. If the default Tax Group is not the correct selection for the site, make the correct selection from the drop-down list by clicking the arrow to the right of the field. This is a required field.

Tax Exempt #: If a Tax Exempt # was entered on the Customer Information form, that same value defaults into the Site Tax Exempt # field. If the Tax Exempt # for the Site is different than the Customer, you can manually enter the correct value into this field. If any information is entered into this field, sales tax will never be calculated for any invoice created for this site. A space or a period or any character entered into this field will make the site exempt from sales tax.

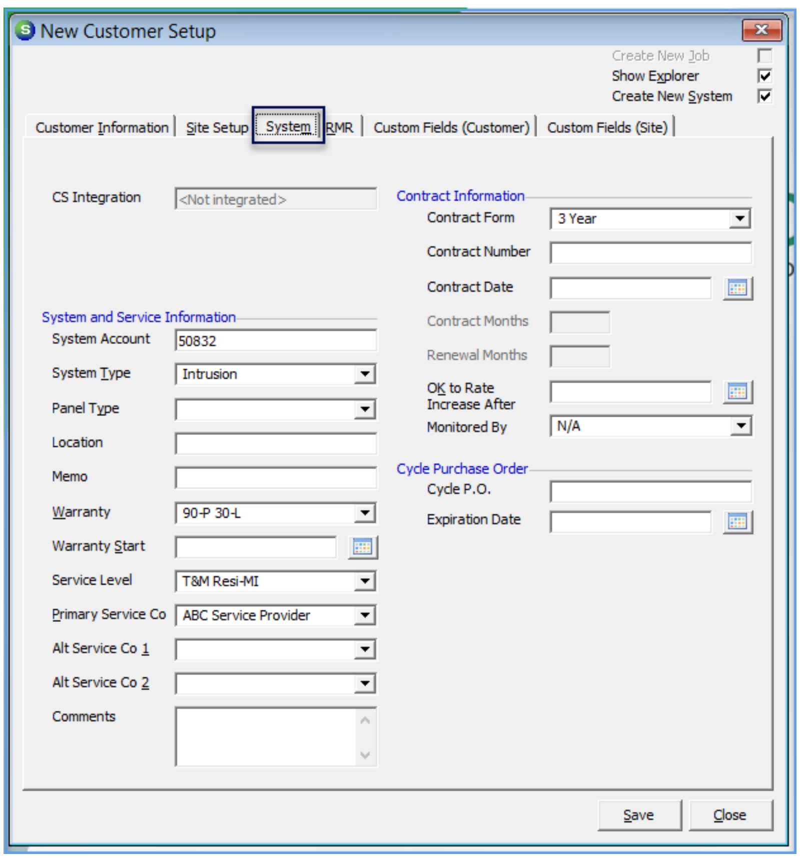
Once all information is entered on the Site Setup form, click on the System tab to enter System related information.

System Tab

Once all information is entered on the Site Setup form, enter information on the System Setup form; click on the System tab.

The System form opens. Make selections in the required fields and other optional fields according to your company policy and procedures.

The System form is divided into three sections: System Information, Contract Information, and Cycle Purchase Order. Each data entry field is defined under the heading of each section on this form on the System Setup Details page. In any data entry field that displays an arrow to the right of the field, you must make a selection from the drop-down list. In fields without an arrow to the right, you can enter any information desired as long as the number of characters does not exceed the field limit. Pressing the Tab key on the keyboard advances to the next data entry field. Pressing the Shift and Tab keys simultaneously moves the cursor back one field. You can also use the mouse to click on the next field to enter information.



System Information

C/S Integration: If you selected a Central Station on the Site Tab, then you will need to make the same selection on the Systems Tab. Otherwise this field is not required for use.

System Account: This field defaults to the customer number but can be changed. This field is typically used to reference the central station account number. If the system is not a monitored type of system such as CCTV or access control, typically CCTV or Access followed by the customer number is entered into this field. This is an alpha-numeric field that allows up to 25 characters. This is a required field if the option Require System Account has been activated in SedonaSetup/AR Setup Processing.

System Type: This field identifies the type of system installed or that will be installed (for exampe, Security, Fire, CCTV). This field automatically fills in with the default system type found in SedonaSetup/Data Entry Defaults. You can change the system type by making a selection from the drop-down list by clicking the arrow to the right of the field. This is a required field.

Panel Type: This field identifies the type of panel installed or that will be installed. Make a selection from the drop-down list by clicking the arrow to the right of the field. This field is optional but highly recommended.

Location: The physical location where the panel is or will be installed. The location will print on future service tickets. This field allows up to 50 characters. If the system has not yet been installed and it is unknown where the Panel will be located, this field can be updated later. This field is optional but highly recommended.

Memo: This is a short informational note that will display on the service ticket form but will not print on service tickets. This field allows up to 50 characters. An example of information entered into this field is: Large dog in front yard.

Warranty: This field identifies the warranty plan for this system. Warranty codes define how many days parts, labor and other charges are covered from the Warranty Start Date (next field below). Make a selection from the drop-down list by clicking the arrow to the right of the field.

Warranty Start: Enter the date the Warranty begins. If the system is not yet installed, the Warranty Start Date will be activated during the job closing process.

Service Level: Once the warranty on a system has expired, the service level determines whether a customer will be charged for servicing the system. Make a selection from the drop-down list by clicking the arrow to the right of the field. If the system is not a monitored account, a selection is still required for this field.

Primary Service Co: The field describes the primary company providing service for the system. This can be your company or a subcontractor (service provider). If this system will typically be serviced by a company other than yours, select the primary service company from the drop-down list.

Alt Service Co 1: This field describes the first alternate company providing service for the system. This can be your company or a subcontractor (service provider). When creating a service ticket for this system, the Alt Service Co 1 will appear in the Service Company drop-down list for the user to select. This field is optional.

Alt Service Co 2: This field describes the second alternate Company providing service for the system. This can be your Company or a subcontractor (service provider). When creating a service ticket for this system, the Alt Service Co 2 will appear in the Service Company drop-down list for the user to select. This field is optional.

Comments: This is a free form 1,024 character field for informational purposes and will display on the Service Ticket form and may be print on service tickets. This field can be used to communicate important information related to the System that will be helpful to the technician performing a service call.

Contract Information

Contract Form: This field identifies the type of contract the customer has signed. Make a selection from the drop-down list by clicking the arrow to the right of the field. If the customer has not signed a contract, no selection is required for this field. This field is optional, but recommended.

Contract Number: This may be a number that is pre-printed on the physical contract document or a contract form/revision number. This field is for informational purposes only. This field is optional.

Contract Date: This is the start date of the contractual agreement between your company and the customer for the installed System. The contract date is used in conjunction with the contract months in the Customer Cancellation Queue to calculate the balance of contract if the customer terminates prior to the end of their contract. This field is optional, but recommended.

Contract Months: If a Contract Date was selected in the previous field, the contract months is required. This is the initial term of the contract in months. The maximum allowable number of months is 120 (10 years). The Contract Months is used in conjunction with the contract date in the Customer Cancellation Queue to calculate the balance of contract if the customer terminates prior to the end of their contract.

Renewal Months: The Renewal Months is the number of months for which the contract will renew after the initial contract months has expired.

OK to Rate Increase After: This date is used by the Company Rate Change program that is used to increase customer recurring lines based on criteria entered by your company. The customer's recurring lines are not be available to increase until the date entered into this field. For example, if the date entered into this field is 6/3/14 and the effective date of the Rate Increase batch is 6/1/14, any recurring lines linked to this site would not be eligible for an increase. There is also a Bypass RMR Increase date available at the recurring line level. Manual recurring line increases can be performed on individual recurring lines. The OK to Rate Increase After date has no impact on a manual rate increase on a recurring line. This field is optional, but recommended.

Monitored By: This field identifies the name of the alarm company that is or will be monitoring the account. Make a selection from the drop-down list by clicking the arrow to the right of the field. If the system is not a monitored account, no selection is required for this field. This field is optional.

Cycle Purchase Order

Cycle P.O.: If your customer has issued your company a Purchase Order that must be referenced on all Cycle invoices only, enter the Purchase Order number in this field. If an entry is made in this field, the next field, Expiration Date is not required but recommended. You can enter up to 50 characters in this field. This is an optional field.

Expiration Date: If a Cycle P.O. number was entered in the previous field, you may enter a date on which the Purchase Order will expire. This is not a required field but recommended.

Once all information is entered on the System form, click on the RMR tab to set up Recurring Lines.

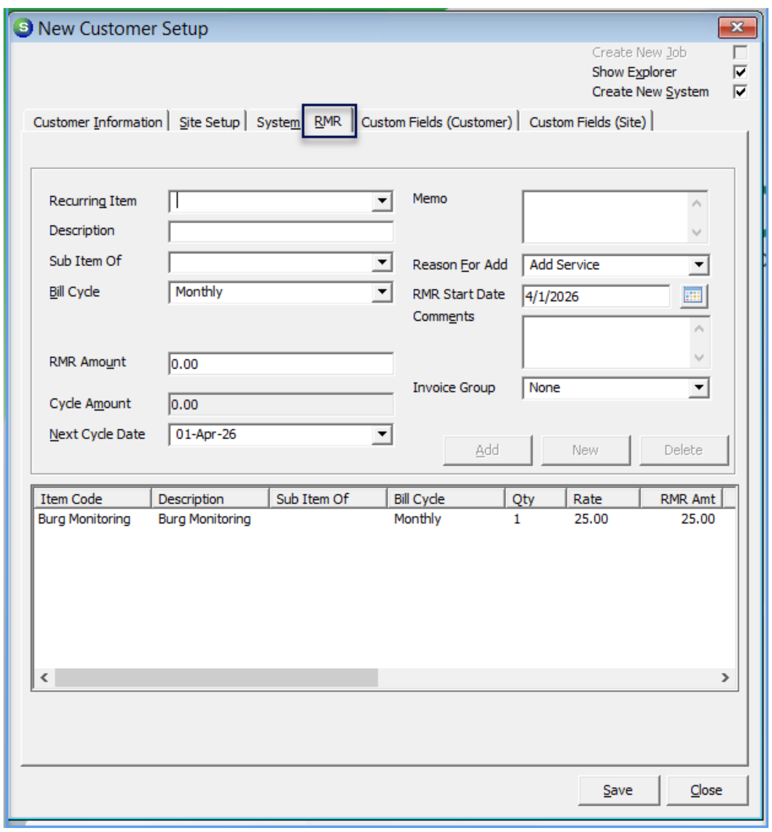
RMR Setup

Once all information is entered on the System Setup form, enter information on the RMR form (read the information below prior to creating recurring lines); click on the RMR tab.

- If this is a new system installation, and a new job is going to be created for the installation and the Recurring will be activated and invoiced on a job invoice, do not set up Recurring Lines on this form. Proceed to the Custom Fields Tab below.
- If this is a system that is already installed (Reactivation or Re-sign situation) and new recurring will be activated and the recurring will be activated and invoiced on a job invoice, do not set up Recurring Lines on this form. Proceed to the Custom Fields Tab below.
- If this is a system that is already installed (Takeover situation) and new recurring will be activated and a job will not be created for activating the system, you can create the necessary Recurring Lines on this form.

Note: Recurring Lines do not have to be setup during customer creation. If it is the policy of your company to have a different staff member setup the recurring lines later, you can do so according to your company policies and procedures.

The RMR form opens. The RMR form is divided into a two-tier data entry form. Enter the information for new Recurring Lines in the upper area of the form. When you click the **Add** button in the upper tier, the Recurring Line is displayed in the grid area of the lower tier of the RMR form. Make selections in the required fields and other optional fields according to your company's policy and procedures. Add as many recurring lines as necessary.



RMR Data Entry Fields

Recurring Item: Choose the appropriate Recurring Item code that describes the type of service that will be invoiced to the customer. Make a selection from the drop-down list by clicking the arrow to the right of the field. This field is required.

Description: This field automatically defaults to the description associated with the Recurring Item code maintained in

SedonaSetup/Invoice Items. You can change the description, but changes only affect this one Recurring Line. Enter up to 50 characters of information into this field. This information will print on the customer's cycle invoice. This field is required.

Sub Item Of: Select the Recurring Item to be used as a roll-up Recurring Item. If the customer will be invoiced for multiple Recurring Lines and you want to group certain Recurring Lines together so that only one Recurring Item appears on the customer invoice, assign the same Recurring Item to each recurring line that will be grouped together. This field is optional.

Bill Cycle: This field indicates how frequently the customer will be invoiced for the Recurring Item. Select from one of the available choices: monthly, quarterly, semi-annual, or annual. This field is required.

RMR Amount: If you selected the Bill Cycle of monthly in the previous field, enter the monthly charges for the recurring line. If a Bill Cycle other than monthly was selected, this field is grayed out and the amount to invoice is entered in the Cycle Amount field (next field below). If the Bill Cycle is not monthly, when you enter an amount in the Cycle Amount field, the field automatically fills in. This field is required.

Cycle Amount: If you selected a Bill Cycle other than monthly, this field is available to enter the cycle amount. For example, if the monthly charge for this service is $25.00 per month, and the bill cycle selected is quarterly, you would enter the Cycle Amount of $75.00. This field is required.

Next Cycle Date: From the drop-down list, select the next cycle date that this recurring line will begin billing by clicking the arrow to the right of the field. If it is needed to back date the start of the recurring prior to the current accounting month, the User may go back as far as 12 months to begin billing. Scroll to the bottom of the Next Cycle Date list to locate and select older billing periods. This field is required.

Memo: The Memo field is used to enter information pertaining to the Recurring Line. This information prints on certain custom invoice printing forms. This field is typically used for internal company information. This information will not print on the customer invoice unless a custom invoice form that prints this field is selected during printing, or the printing option of "Show Item Memos" has been selected on the Printing Preference/Item Detail form. The User may enter up to 2,000 characters of information into this field. This field is optional.

Reason for Add: Select the RMR reason code from the drop-down list that identifies the reason for the creation of this Recurring Line. This field is required.

RMR Start Date: Enter the date that recurring services will begin billing for this Recurring Line. If it is your company policy to prorate Recurring Lines that start after the beginning of a normal billing cycle, this may be accomplished by entering the actual start date of the Recurring Line in this field and then selecting this same month/year in the Next Cycle Date field. This is a required field.

Comments: This is a free form text field to enter comments specific to this recurring line. This field is for information purposes only and will only print on certain Custom Invoice forms. The User may enter up to 255 characters of information into this field. This field is optional.

Invoice Group: The Invoice Group Number will default to "None" but If you need to separate this recurring line to be invoiced at a different time, you may select an Invoice Group from the drop-down menu numbered from 1 to 9.

Correcting RMR Errors

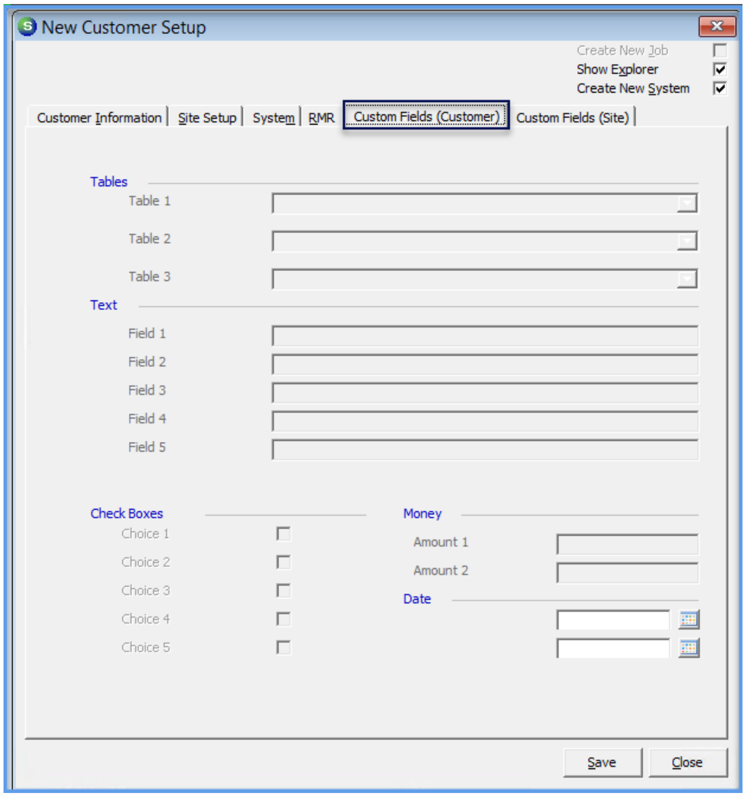
If you clicked the **Add** button and realize you made an error and want to re-enter the Recurring Line, you must delete the previously added recurring line. To delete a recurring line, highlight the line to be deleted in the lower area of the RMR form, then click the **Delete** button in the upper tier of the RMR form.

Custom Fields Tab

The Custom Fields form is an optional form for tracking additional information important to your company. Make selections in the required fields and other optional fields according to your company policy and procedures. Required fields are highlighted in yellow. You cannot save the customer record until selections or data is entered into fields flagged as required.

Once all information has been entered on the Custom Fields form, follow the instructions in Saving a New Customer for the last step of entering a new customer

If the Custom Field tab is grayed-out, or not visible, your company has elected not to use the Customer Custom Fields, or you do not have the appropriate permissions to access the Customer Custom Fields form.



Saving a New Customer

Once all information has been entered for the Customer, Site, System, RMR and Custom Fields, click the **Save** button at the lower right of the New Customer Setup form. A message appears confirming you are ready to save the new customer; click the **Yes** button to accept.

After the new customer has been saved, the Customer Explorer record is displayed. Additional information such as Contacts, additional Bill To records, Additional Sites, Additional Systems, Credit Card or ACH, and Central Station

Tracking information can be added to the customer at this time. Refer to Additional Customer Data Entry for further instructions.