Formatting Customer Names

When entering the Customer Names and Bill To Names it is recommended the following formatting rules be followed. When performing customer searches, for residential type customers, it is much easier to sort and find the correct customer if the last name is entered first, followed by the first name. When performing a customer lookup and the search by option of Name is selected, the application searches the Customer Name, Bill To Name and Site Name to locate the requested customer record.

For Site Names, typically the name is entered as it is to be printed on Service Tickets and Job Tickets.

For Commercial type customers, enter the Bill To Name exactly as it is to be printed on invoices, statements and other documents sent to the customer.

For Residential type customers, it is recommended to enter the last name followed by a comma, a space and then the first name of the customer. For example, the customer name Jonathan Smith would be entered as Smith, Jonathan. Below is an example of how to enter names for different Residential type customer situations. For most invoice printing forms and statements, the application will automatically format the printing name based upon where the comma is entered in the Bill To Name. The chart below demonstrates how to enter a name depending on what the desire result is for printing customer invoices, statements and other documents; these formatting rules only apply to Residential type customers.