

Add Additional Bill To's

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When a new customer is created, the information entered in the Primary Bill To Information section of the Customer Information tab automatically creates a Bill To record for the customer.

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If additional Bill To Names/Address need to be set up for the Customer, follow the instructions below.

Additional Bill To's may be added to the Customer at any time. If the customer has multiple Sites, and each Site is to have a separate billing address, you would create a Bill To record for each Site and then link the appropriate Bill To record to the Site. You may also link a Bill To address to a recurring line.

1. From the Customer Explorer, highlight the Bill To menu option. Right-click and select the New Billing Information option.
2. A blank Customer Billing Information form will be displayed. Enter the required information according to your company's policies and procedures.

If the new Bill To record that is being entered is to become the new Primary Bill To, select the Primary Mail check box located in the upper right area of this form. Once the new Bill To record is saved, the old Primary Bill To record will have the Primary flag deselected but will still be available for use.

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Invoice Types - To the right of the phone number fields are four check box fields which allow you to specify which types of invoices are to use this billing address as the default. You may check one, multiple or all of the boxes available. For example, if you want to use one Bill To for recurring invoices only, you check the Primary RMR checkbox only.

When finished, click on the Save button located at the lower right of the form.

Once the New Billing Information has been saved, it will be added to the customer tree within the Customer Explorer.