

Lesson 2.1 Customers - New Account

Objective At the end of this lesson you will be able to key in data to *set up a new customer account*.

Overview When a company first starts using Sage it is necessary to key in the name, address and other descriptive details of all their customers. If the company gets new customers their name, address and other details must be keyed in to update the account records.

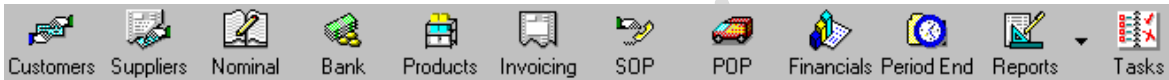
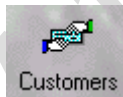


Figure 16 - Sage Main Toolbar

Open Customer Window

Click



The Customer Window similar to below is shown

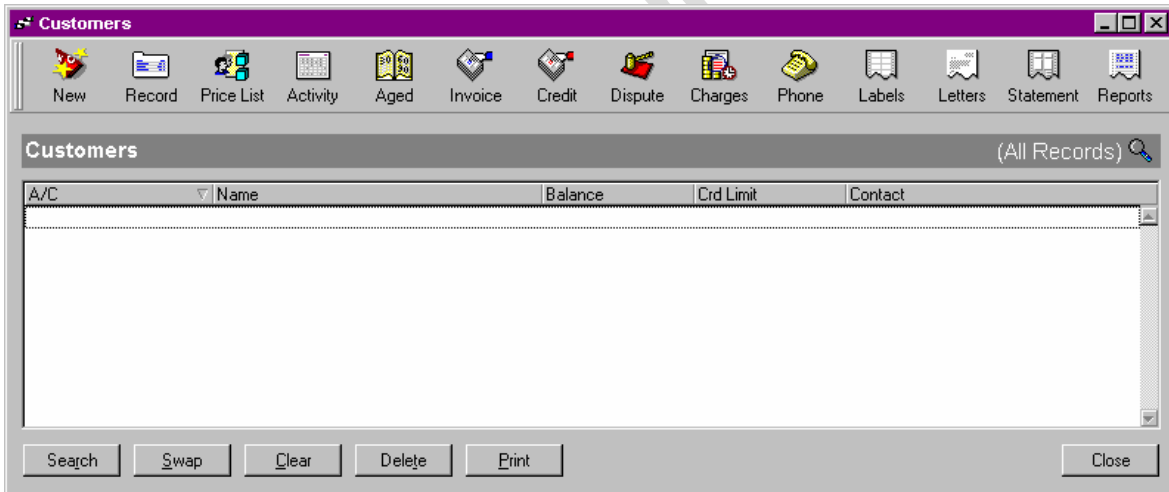


Figure 17 - Customer Window

Open Customer Records



Figure 18 - The Customer Record screen

A Customer Record form as above is presented. Most of this form is blank. Some of the form will all ready be filled in due to settings in Configuration and Setup of SAGE. e.g. Each customer will have a default currency and Vat Rate.

The Cursor will be in this box:  This is the A/C or Account Number field. This will serve as a way of finding and calling up the customers data later.

 Do not click the *Finder button* . It will pop up a customer list.

The Account/Code for a customer can be up to 8 characters long. Each customer must be given a unique code, the same code cannot belong to two customers. The most popular form of coding is an abbreviation of the customers name. Thus a customer named Timothy J Murphy could be coded as MURPTJ or MURP1. A customer named Calacop Engineering Ltd could be coded as CAL or CALCOP. For this exercise we have a customer called BRIDGETOWS ELECTRICAL LTD.

Entering Customer Data

Cursor is in:

Type BRIDGE

Press

Type BRIDGETOWS ELECTRICAL LTD.

Press

Type Villers Road

Press


Type Ballinacolla

Press

Type Douglas

Press

Type CORK

 Make sure above details are entered correctly before proceeding to next step.

Set Customer Defaults

Click the **DEFAULTS** Tab of the Customer record window



We will set the following defaults:


Nominal Account 4001
Tax Code T1

Click

into

You will need to click here or press the TAB key on the keyboard until you reach this field.

Click

the **“Finder Button”**  to display a list of nominal ledgers

Click

once on the nominal account **“4001 Sales Type B”**

A/C	Name
4001	Sales Type B
4002	Sales Type C
4009	Discounts Allowed
4100	Sales Type D
4101	Sales Type E
4200	Sales of Assets
4400	Credit Charges (Late Payments)

Figure 19 - Nominal Ledger Accounts

Click

Click

the tax code drop-down arrow

Click

once on the **T1** code to select

T0 0.00
T1 21.00
T2 12.50
T3 0.00
T4 0.00
T5 0.00

The T1 vat code is set and you are returned to the defaults of the Customer record

Set Customer Credit Terms

Click

the **CREDIT CONTROL** Tab of the Customer record window

Click the “**Terms Agreed**” box to place a tick mark in it.

Details | Defaults | **Credit Control** | Sales | Graphs

Terms

Credit Limit: 0.00

Sett. Due Days: 0

Sett. Discount: 0.00

Pay Due Days: 0

Terms:

Restrictions

Can charge credit Restrict mailing

Terms agreed Account On Hold

This indicates that we have advised our customer of agreed payment terms. If you do not place a tick in this box Sage will warn you when you process an invoice for the customer

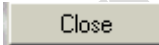
Figure 20 - Customer Record, Credit Control

Save

All of the data you have just completed for the customer record is stored. A blank Customer Record form is again shown, ready for entry of the next customer details. The cursor is back in the A/C box.

Exit to Main Menu

Click  to return to Customer ledger

Click  on Customer Ledger Window to return to Main Window

END LESSON

2.1.a Lesson SUMMARY

To create a new customer account (record)

1. Open Customer Ledger
2. Open Customer Records
3. Type Customer Code
4. Type Customer Data



The next step will complete the customer record and save it to disk.

Make sure the data you have entered on screen is correct before proceeding.

To correct any data: click cursor into field to be corrected

edit data or type new data

5. Save completed customer record
6. Re-do steps 3-5 for each new customer
7. Click CLOSE button to finish

If you save incorrect data you can retrieve the record and adjust any data (excepting the customer code)

2.1.b Practical- Customer New Account

Enter in the details of the following three customers

Code	Name	Address
MUL01	Mr. Martin Mulcahy	Number 4 Carnossoty Street Clonakilty, Co. CORK

Set the following defaults:

Nominal Account 4002
Tax Code T1

Credit Control:

Terms Agreed – "Yes"

MUL02	Martina Mulcahy	Flat 24c Netcare Buildings South Mall, CORK
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Set the following defaults:

Nominal Account 4001
Tax Code T1

Credit Control:

Terms Agreed – "Yes"

SANTA	Santa Maria Hair Care	Unit 32 Clonturno Industrial Estate Barcelona, Spain
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VAT Number sp10111

Set the following defaults:

Nominal Account 4000
Tax Code T0
Terms Agreed – "Yes"



Make sure the data you have entered on screen is correct before hitting the SAVE button in each record.

When all three are typed and saved, close any opened windows and return to main window

Breakpoint - SAGEBACK.C01