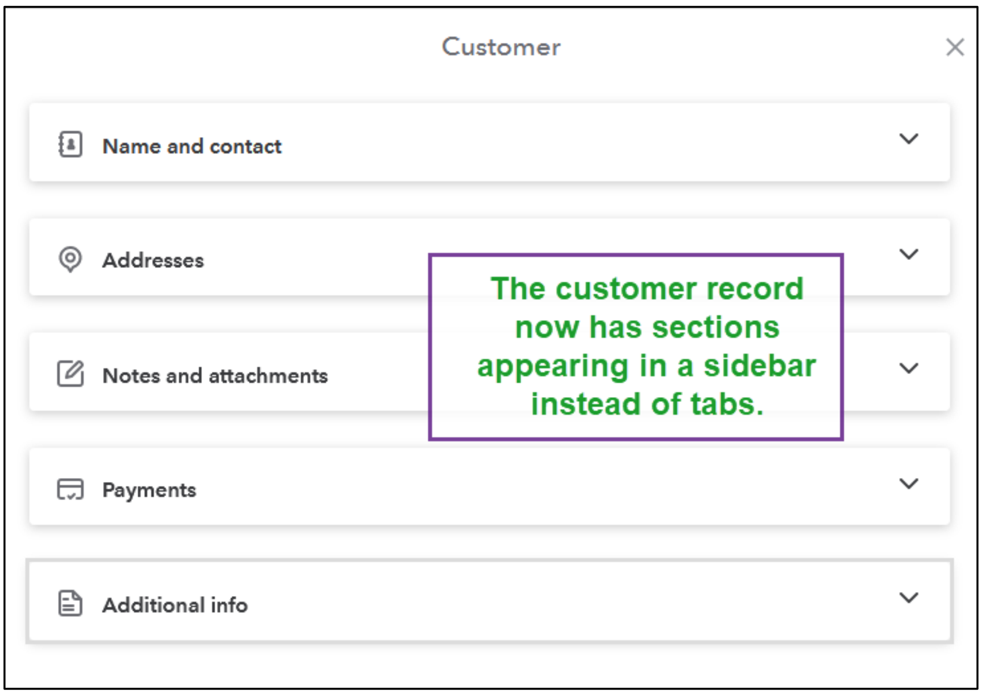
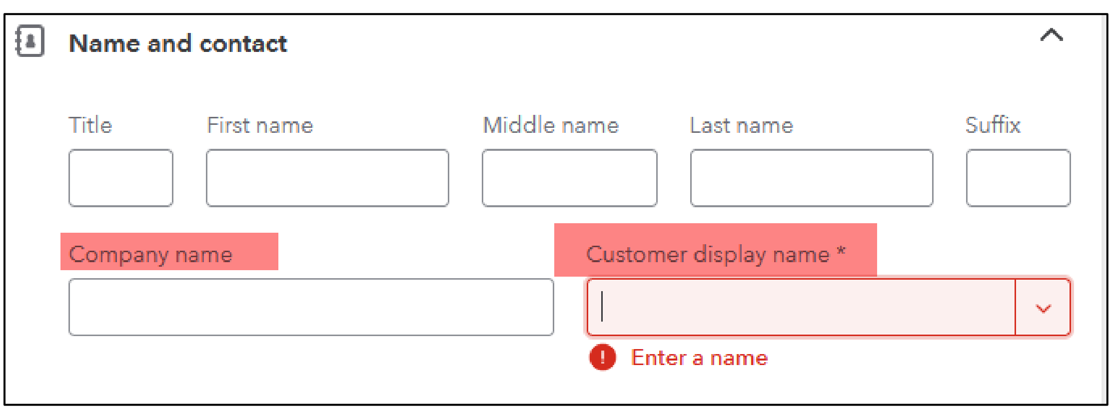
Customer and Vendor Records
New Screens
Chapters 3 and 4

When creating a new customer or a new vendor, the screens and some of the terms have changed. For both, a sidebar with sections will now appear when adding or editing.

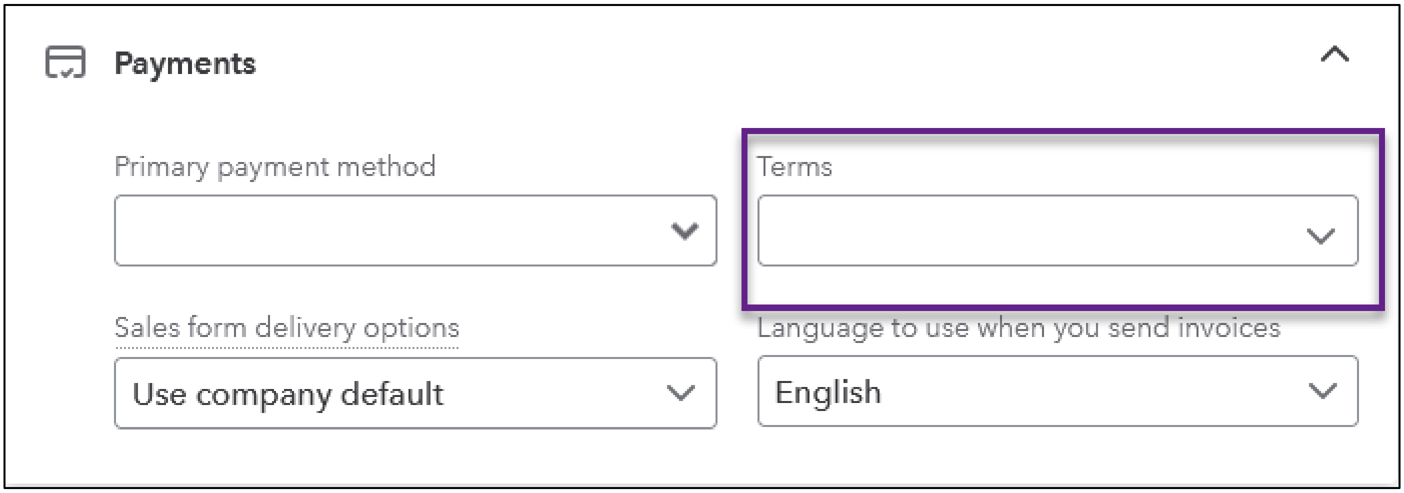
Customer setup: The five sections for a customer record are **Name and contact**, **Addresses**, **Notes and attachments**, **Payments,** and **Additional information**.



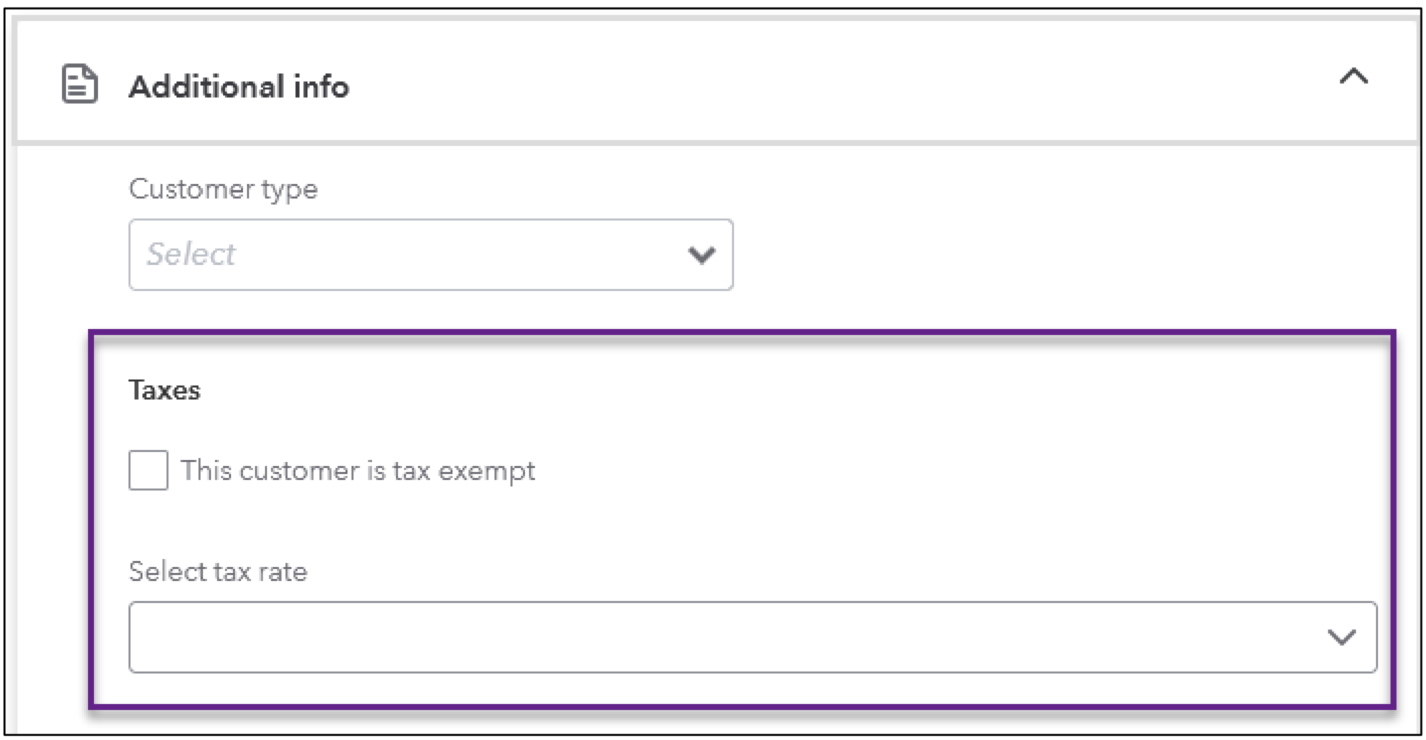
In the **Name and contact** section, **Display name** is now called **Customer display name,** and **Company** is now called **Company name**. They function exactly as they have in the past, and **Customer display names** must still be unique.



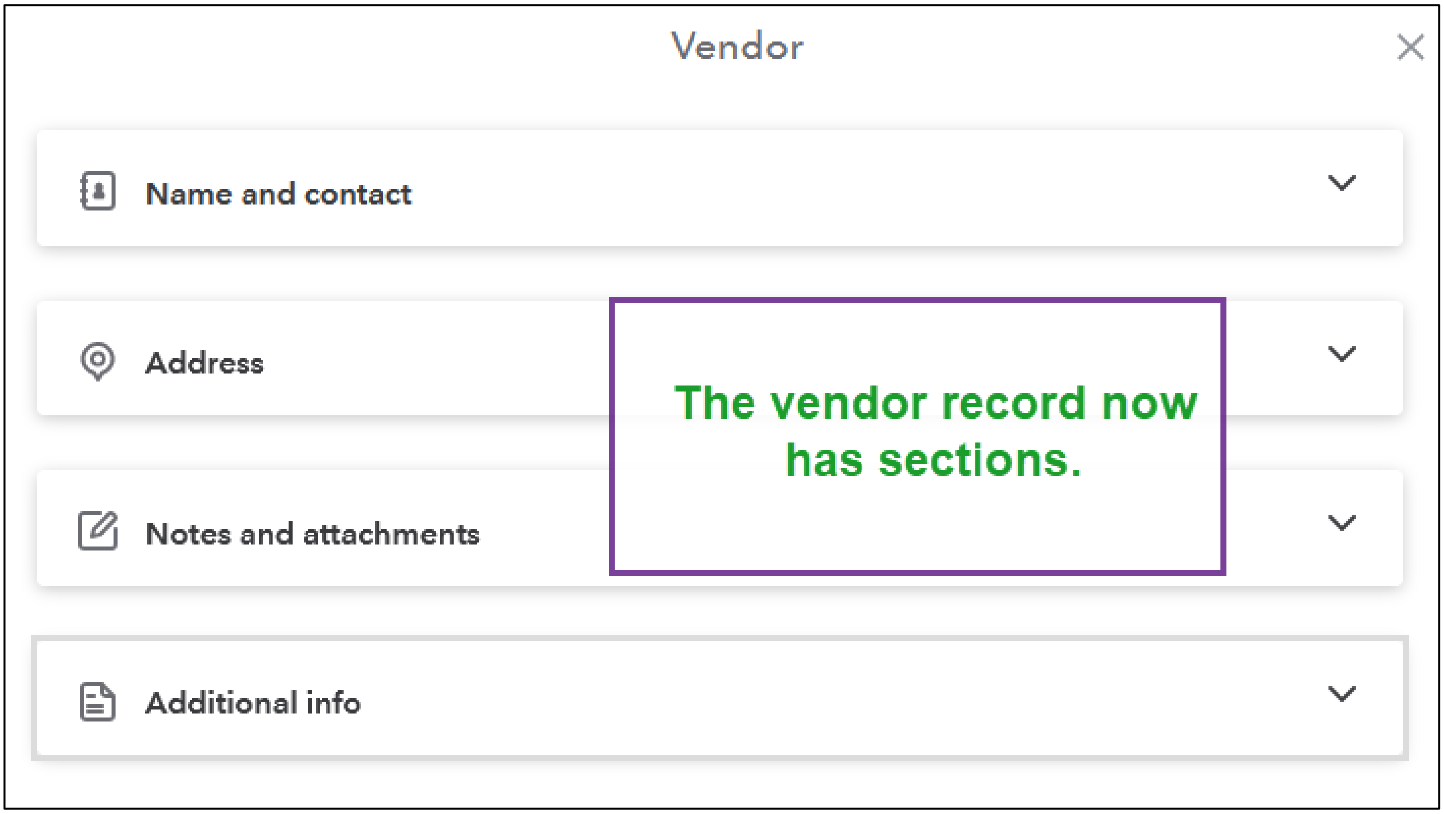
Terms are in the **Payments** section of the customer record.



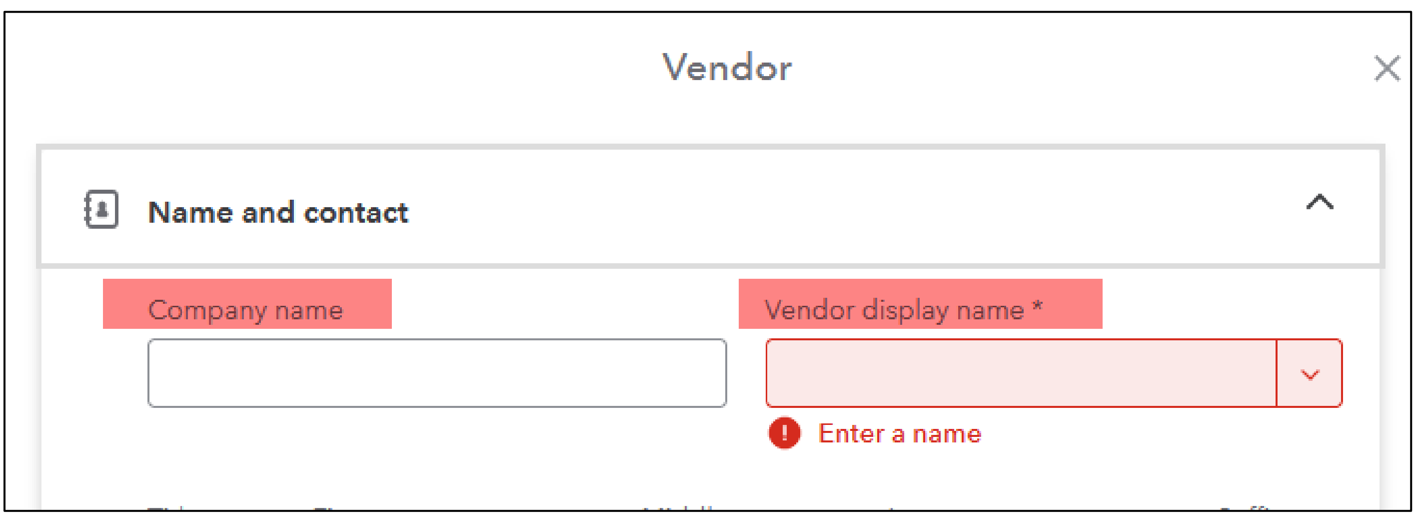
Taxes are in the **Additional information** section.



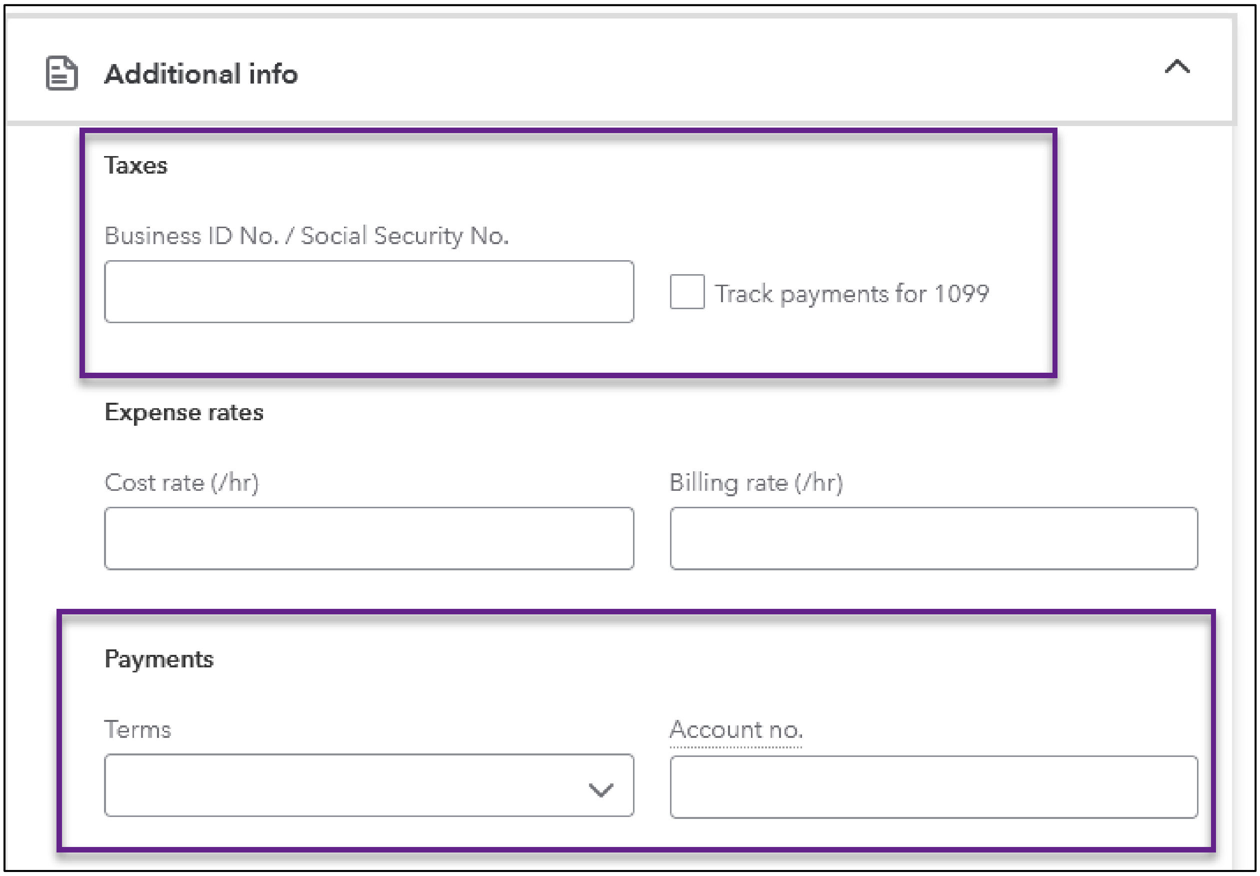
Vendor setup: The vendor record has four sections: **Name and contact**, **Addresses**, **Notes and attachments**, and **Additional information**.



In the **Name and contact** section, **Display name** is now called **Vendor display name,** and **Company** is now called **Company name**. They function exactly as they have in the past, and **Vendor display names** must still be unique.



Terms, Business ID, and **Track payments for 1099** are located in the **Additional information** section of the vendor record.



The new sidebar will also open when adding a new customer or vendor while in a form, such as an **invoice** or **bill**. (The shortcut box for adding names without detail is no longer available.) The customer or vendor will be created as long as you enter the required **Customer display name** or **Vendor display name.** A company name should also be entered if you want a name to appear on forms. Contact information and terms are not required.