

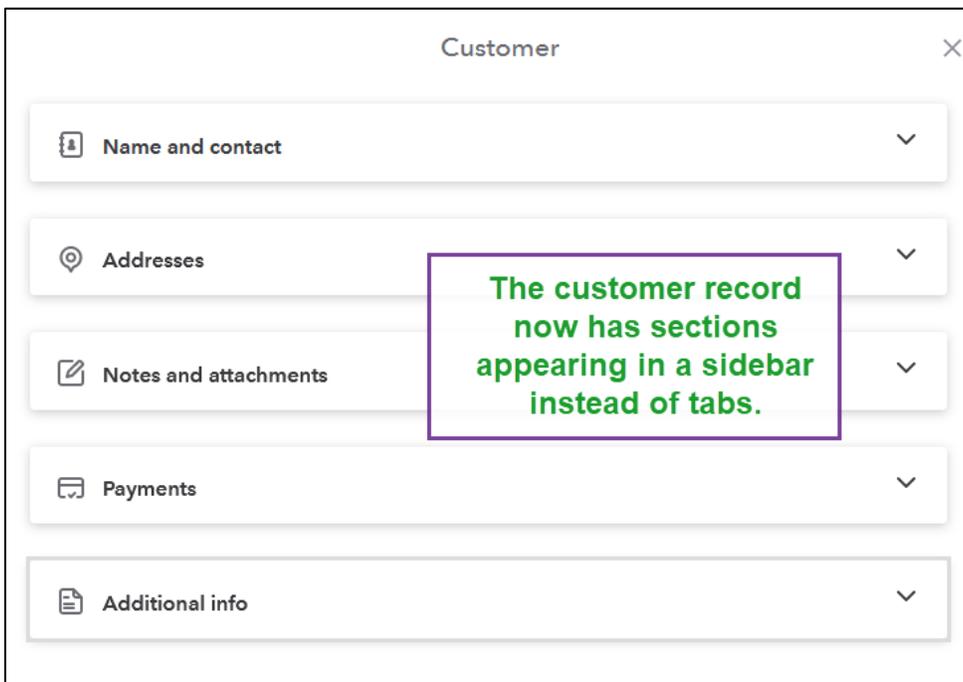
Customer and Vendor Records

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.

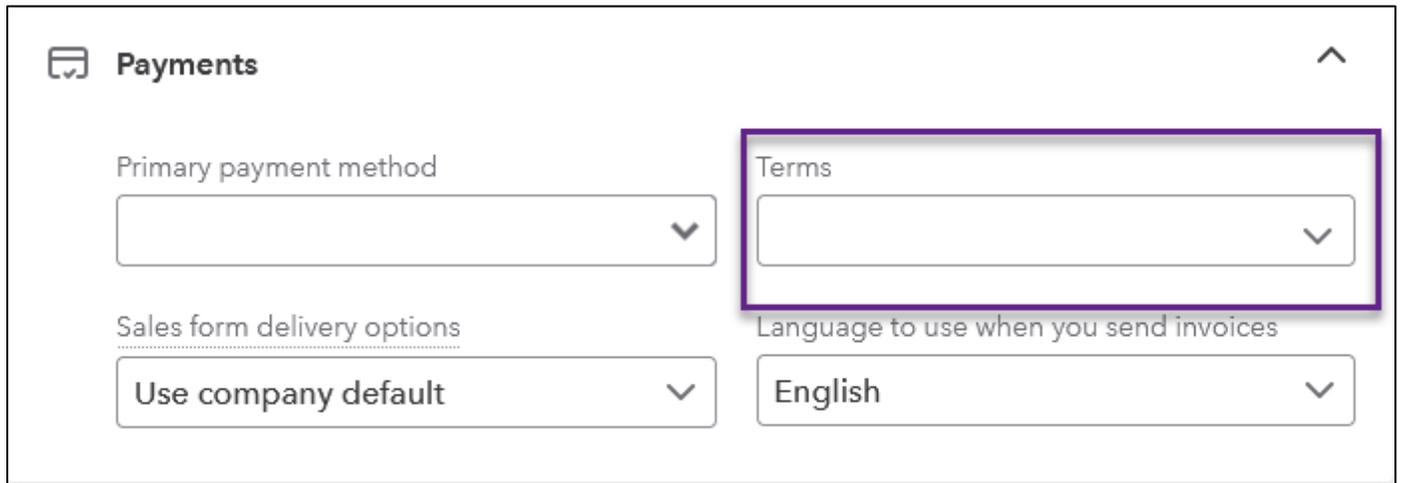
Customer setup: The five sections for a customer record are **Name and contact**, **Addresses**, **Notes and attachments**, **Payments**, and **Additional information**.



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.

The screenshot shows the "Name and contact" section of the customer record form. It features five input fields for "Title", "First name", "Middle name", "Last name", and "Suffix". Below these are two more fields: "Company name" and "Customer display name *". The "Customer display name" field is highlighted with a red background and has a red error message below it that says "Enter a name". A dropdown arrow is visible on the right side of the "Customer display name" field.

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



Payments ^

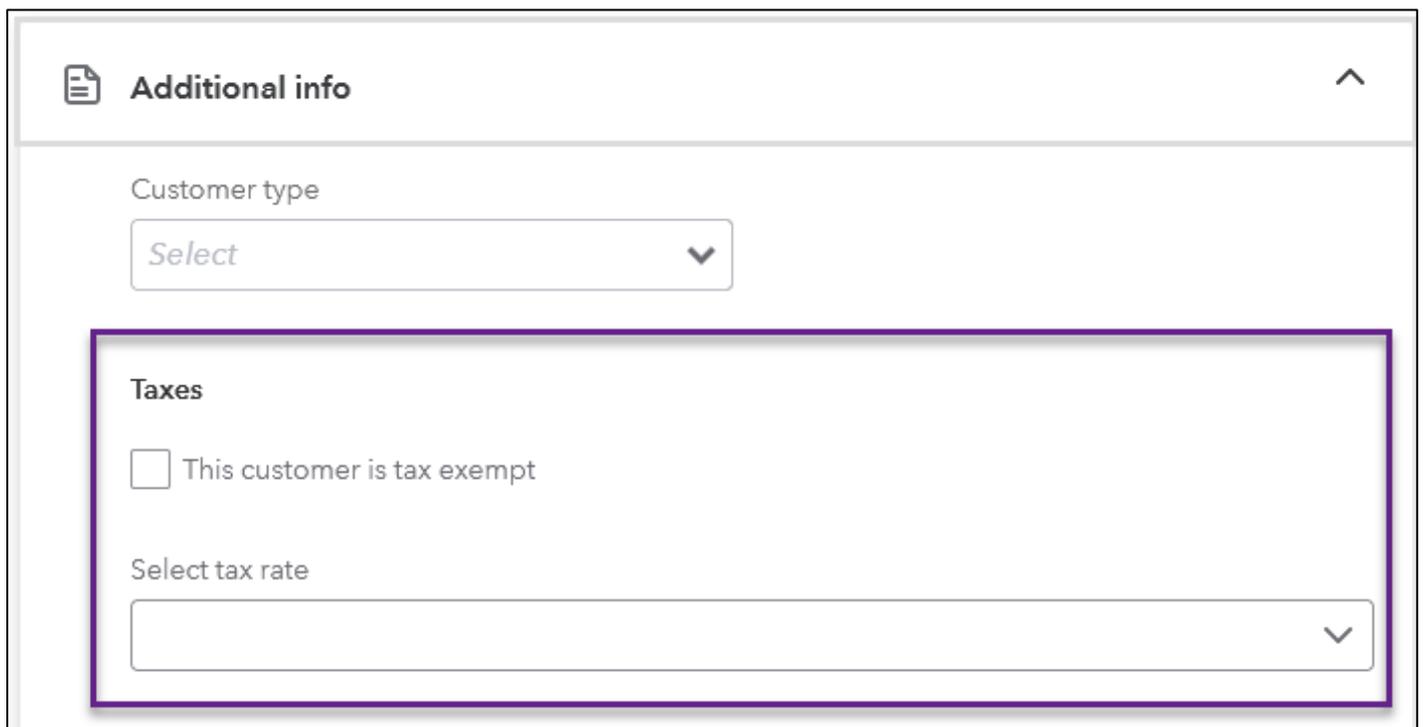
Primary payment method

Sales form delivery options

Terms

Language to use when you send invoices

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



Additional info ^

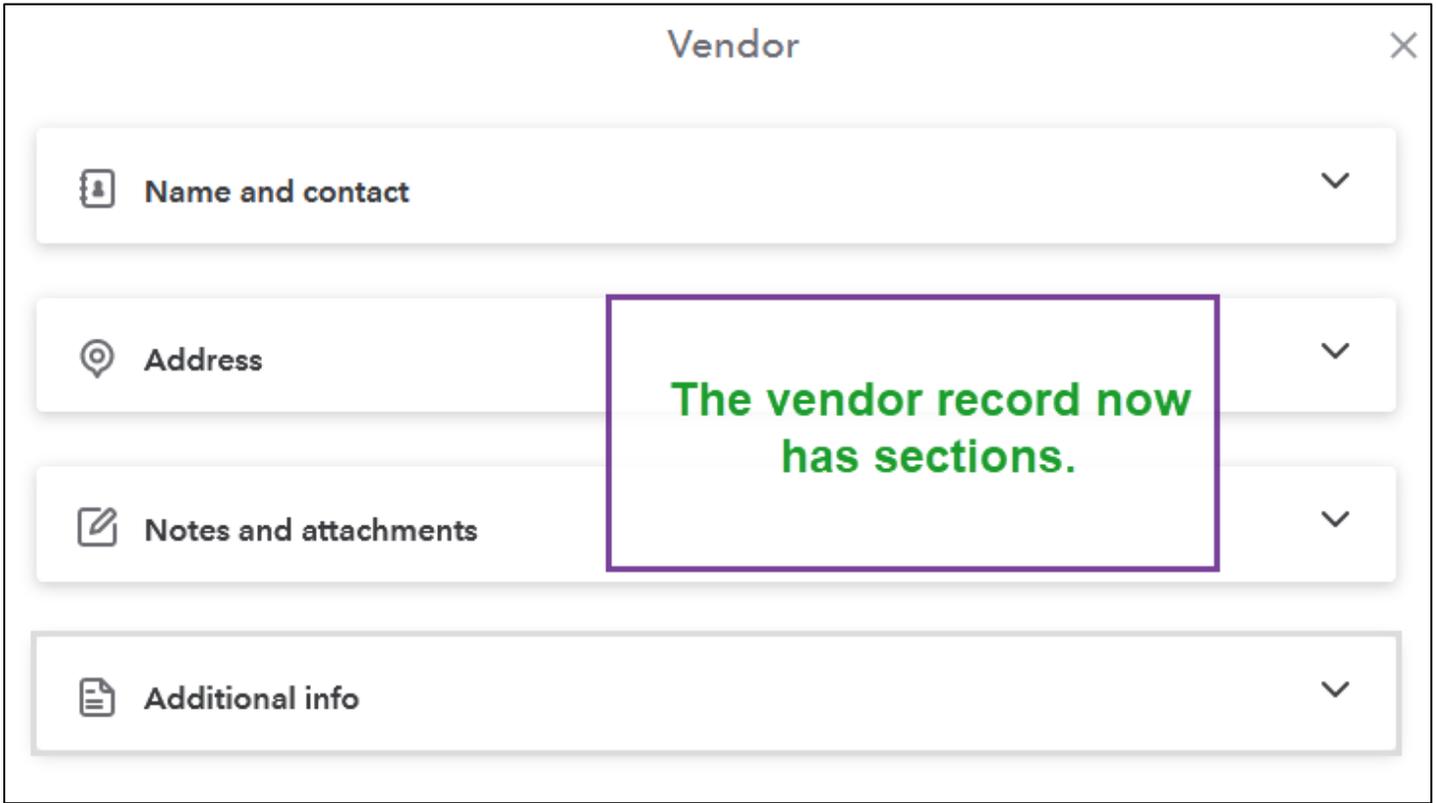
Customer type

Taxes

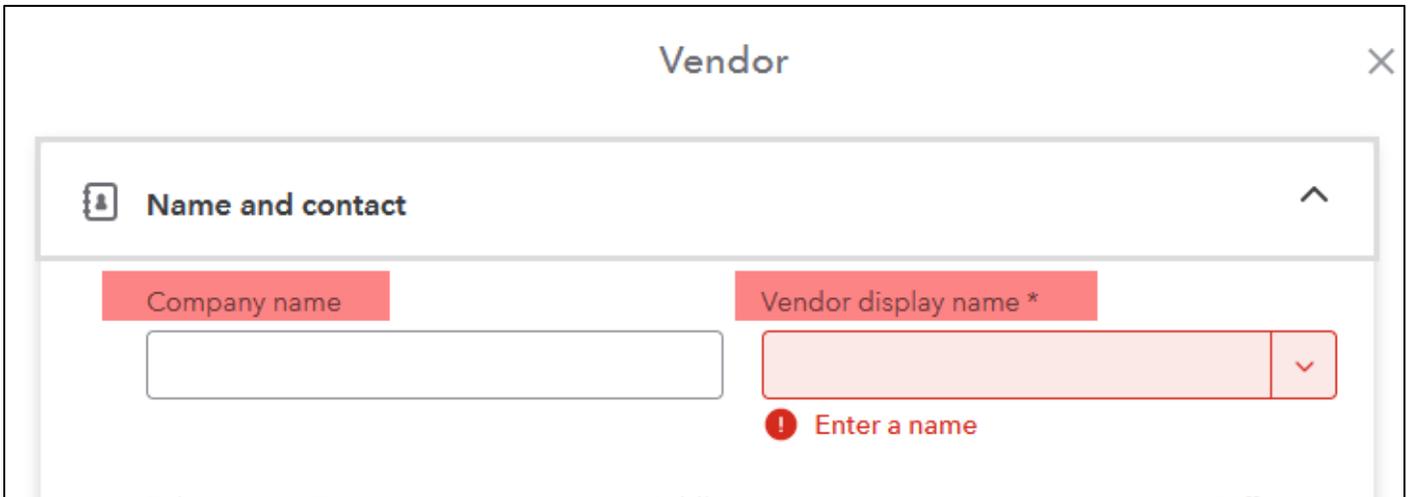
This customer is tax exempt

Select tax rate

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.

Additional info

Taxes

Business ID No. / Social Security No.

Track payments for 1099

Expense rates

Cost rate (/hr) Billing rate (/hr)

Payments

Terms Account no.

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.