

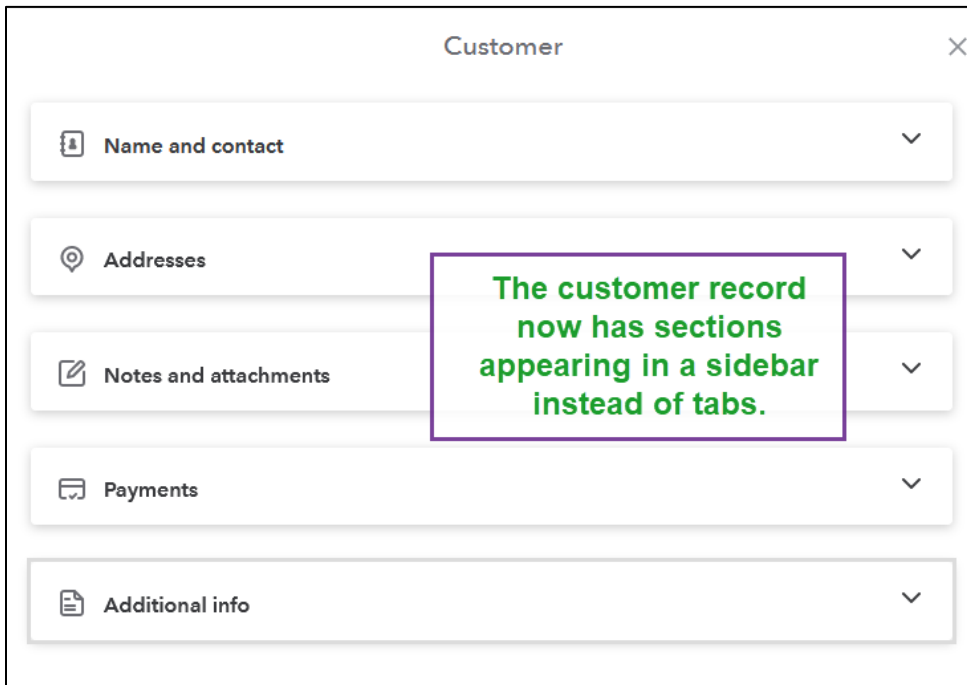
Customer and Vendor Records

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**.



Customer

Name and contact

Addresses

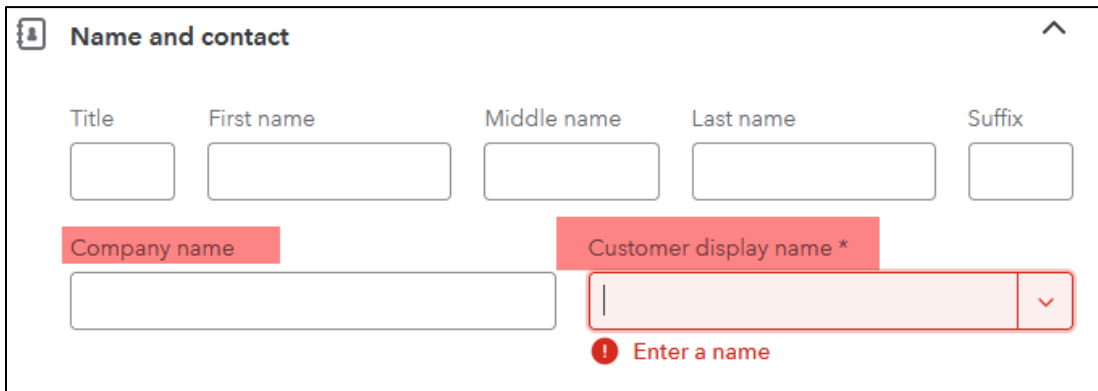
Notes and attachments

Payments

Additional info

The customer record now has sections appearing in a sidebar instead of tabs.

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.



Name and contact



Title First name Middle name Last name Suffix

Company name

Customer display name *

Enter a name

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

 **Payments** 

Primary payment method

Sales form delivery options



Use company default

Terms

Language to use when you send invoices

English

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

 **Additional info** 

Customer type

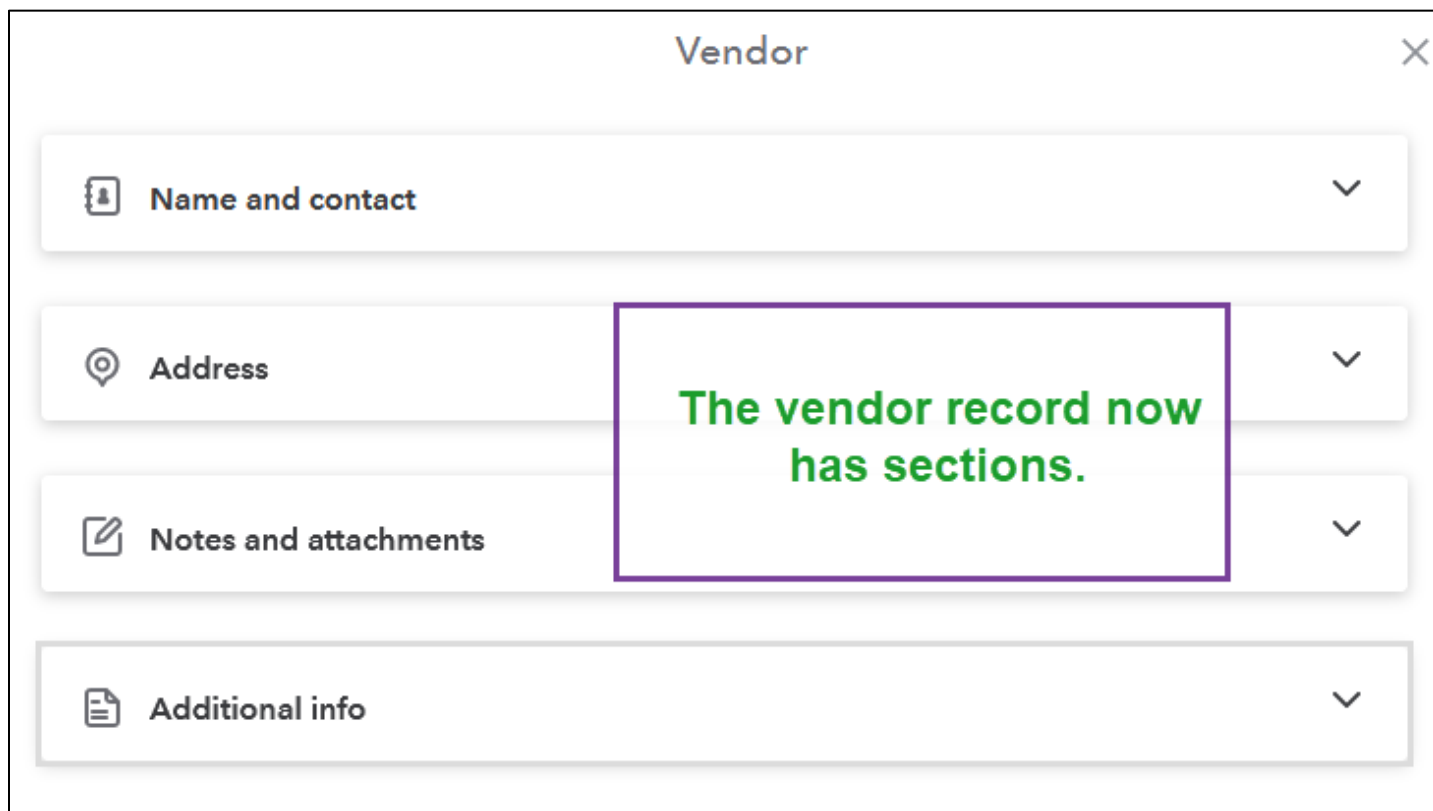
Select

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**.

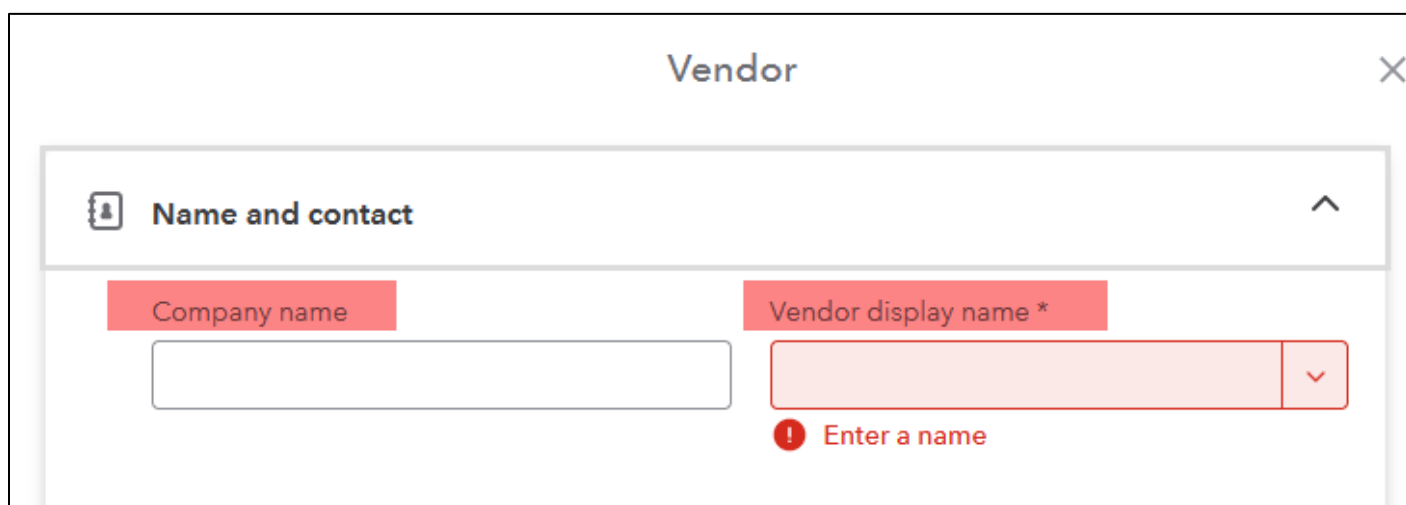


The screenshot shows a window titled "Vendor" with a close button (X) in the top right corner. Below the title bar, there are four expandable sections, each with an icon and a dropdown arrow:

- Name and contact** (person icon)
- Address** (location pin icon)
- Notes and attachments** (notepad icon)
- Additional info** (document icon)

A green rectangular box is overlaid on the "Address" and "Notes and attachments" sections, containing the text: **The vendor record now has sections.**

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.



The screenshot shows the "Vendor" window with the "Name and contact" section expanded. It contains two input fields:

- Company name**: A text input field.
- Vendor display name ***: A text input field with a dropdown arrow on the right.

Below the "Vendor display name *" field, there is a red error message: **! Enter a name**.

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.