

Knowledgebase > SalesPad > Sales > Customer A/R

Customer A/R

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Overview

The Customer A/R tab displays information on the customer's past and current Accounts Receivable, including current total balance due, average number of days to pay, aging period, credit limit, finance charge, minimum payment, maximum writeoff, and A/R-related interaction notes.

Usage

The Customer A/R tab can be accessed from the Customer card, and it is divided into several tabs. The core ones are:

- Overview
- Notes

Note: depending on the modules installed in your system you may see additional tabs (for instance, A/R Transactions Entry).

Overview Tab

The Overview tab has four sections:

- A/R Measures
- Customer Aging
- Contact
- Options

Contact Addresses CRM Note AR Item History Sales Documents CardControl Transactions User Fields Sales Graph Extended Priorig Customer Quick Reports Recurring Sales Default Doc Items Wallet Special Pr

A/R Measures			Customer Aging		Contact	Options	Options			
	Ave	age Days to Pay:	Period		Amount	BILL TO: PRIMARY	Balance Type:	Open Item		
Year To Date:	0		Current		-13,988.64	Add Contact Select Contact	Finance Charge:	Amount	-	50.00
Life To Date:			31 - 60 Days	31 - 60 Days 0.00	Bob Fitz	Minimum Payment	: Amount	-	30.50	
	Date:	Amount:	61 - 90 Days		0.00	10 MICROSOFT WAY REDMOND, WA 98052	Credit Limit:	Unlimited	-	0.00
First Invoice:	12/4/2013		91 - 120 Days		0.00	United States	Maximum Writeof	f: Maximum	-	77.00
Last Invoice:	9/8/2014	545.65	121 - 150 Days		0.00	P: (425) 555-0101 F: (888) 655-9213				
Last Payment:	4/29/2017	609.75	151 - 180 Days		0.00					
Last Statement:	2/15/2017	25,613.13	181 and Over		35,081.90					
Unapplied Amt:		0.00								
NSF YTD:		0.00	Balance:		21,093.26					
Num. NSF YTD:	0		Exempt 1:	30						
			Exempt 2:	999						

A/R Measures

This sections shows, among other information, the average days to pay, first and last invoice, payments, and statements.

Note: Both Average Days to Pay fields (Year to Date and Life to Date) are calculated and stored in GP (calculated) fields RM00103, AVGDTPYR, and AVDTPLIF.

Customer Aging

In this section the user can see the aging periods and balance, as well as set the values for Tax Exempt 1 and 2. Customer Aging can be sorted by Period or Amount.

Click on the Balance hyperlink to view a list of documents on which the customer owes a balance (click a Doc Num to view the specific document):

ess Informati	ion		Customer AR De	etail - Aaron Fitz Electrical/	AARONFIT0001		Ļ
ST APT 2-4 60609	P1: (312) 555-0	Doc Num	Post Date	Payment Terms	Amount Due	Due Date	
	FX: (888) 655-9	SLS11012	1/1/2014	Net 30	2,243.70	2/20/2014	-
		SLS11015	1/1/2014	Net 30	833.33	2/26/2014	
		SLS11016	1/1/2014	Net 30	5,000.00	3/1/2014	
		SVC1000	1/1/2014	Net 30	468.70	7/12/2013	
ss Information	on	SVC1001	1/1/2014	Net 30	2,155.79	11/6/2013	U
	P1: (312) 555-0	SVC11004	1/1/2014	Net 30	1,859.63	2/11/2014	
ST APT 2-4	1000 000 000 000 000	SVC11013	1/1/2014	Net 30	2,356.89	2/25/2014	
00003		STDINV2227	5/8/2015	Net 30	171.10	5/12/2017	
ocuments	CardControl Tra	STDINV2252	4/12/2017	Net 30	5,702.69	5/12/2017	
		SLS20000	1/29/2015	Net 30	2,461.00	2/26/2014	
		DM20005	1/29/2015	Net 30	2,500.00	2/26/2014	
Customer A	Aging	FC20010	1/29/2015		20.00	1/23/2014	
Period		RTN20015	1/29/2015		-2,568.00	1/23/2014	
Periou		STDINV2228	9/11/2016	Net 30	128.30	5/12/2017	
Current		INVS3008	4/12/2017	Net 30	938.93	10/6/2018	
31 - 60 Da	ays	CREDT0000000002	12/31/2014		-50.00	12/31/2014	
61 - 90 Da	ays	RETRN0000000003	12/31/2014		-60.00	12/31/2014	Ŧ
91 - 120 0	Days				21,093.26		
121 - 150	Days						
151 - 180	Days					Clos	æ
181 and C	Over						
Balance:		21,093.26					
Exempt 1:							
Exempt 2:	999						

Note: this requires the plugin Customer AR Detail to be enabled in Security.

Contact

This section allows users to see the Bill To information for the selected customer. The section also features two buttons, with the following functionalities:

- Add Contact allows users to create a new Contact address for the selected customer. This opens the Contact Address card and it requires proper permissions in Security
- Select Contact allows users to set the "Bill To" address by choosing from an existing contact address

Note: in order to access these functionalities the administrator must configure:

- SalesPad to store a Contact Type (Setting Contact Type Field for a Customer Address)
- The Accounts Payable Contact Type (Setting Accts Payable Contact Type)

Options

With proper permissions in Security, the user can edit the following types and values:

- Finance Charge
- Minimum Payment
- Credit Limit
- Maximum Writeoff

Note: The Balance Type is always read only and cannot be changed from SalesPad.

Notes Tab

The Notes tab allows the users to see and, with proper permissions in Security, add, edit, and delete A/R notes.

Contact Addresses CRM Note A/R Item History Sale	es Documents CardControl Transactions	User Fields Sales Graph	Extended Pricing	Customer Quick Reports	Recurring Sales	Default Doc Items	Wallet	Special Pr	
Overview Notes									
New Note Delete									
Created +	Ву	Note							
2/12/2015 7:06:02 PM	fredericp	My note							

The "A/R Note Entry" screen, which is shown after clicking the button **New Note** or double clicking any notes from the grid view, allows users to add new or edit notes for the selected customer.

4	[Custome	r] A/R Note Entry 🚽 🗖	×
Note	New note		4
Type:	A/R		
	Created By: fredericp Changed By:	On 2/16/2015 10:56:06 AM On OK Cancel	_

Settings, Security & Setup

Security

Customer $A\!/\!R^*$ - Allows users to access the Customer $A\!/\!R$ Tab on the Customer Card.