



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

The screenshot shows the Customer A/R Overview tab with four main sections:

- A/R Measures:** Includes fields for Average Days to Pay (Year to Date: 0, Life to Date: 0), First Invoice (12/4/2013), Last Invoice (9/8/2014, Amount: 545.65), Last Payment (4/29/2017, Amount: 609.75), Last Statement (2/15/2017, Amount: 25,613.13), Unapplied Amt: 0.00, NSF YTD: 0.00, and Num. NSF YTD: 0.
- Customer Aging:** A table showing aging periods and amounts.

Period	Amount
Current	-13,988.64
31 - 60 Days	0.00
61 - 90 Days	0.00
91 - 120 Days	0.00
121 - 150 Days	0.00
151 - 180 Days	0.00
181 and Over	35,081.90
Balance:	21,093.26
Exempt 1:	30
Exempt 2:	999
- Contact:** Includes fields for BILL TO: PRIMARY, Add Contact, Select Contact, and contact details for Bob Fitz (10 MICROSOFT WAY, REDMOND, WA 98052, United States, P: (425) 555-0101, F: (888) 655-5213).
- Options:** Includes fields for Balance Type (Open Item), Finance Charge (Amount: 50.00), Minimum Payment (Amount: 30.50), Credit Limit (Unlimited), and Maximum Writeoff (Maximum: 77.00).

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):

Doc Num	Post Date	Payment Terms	Amount Due	Due Date
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
SVC1001	1/1/2014	Net 30	2,155.79	11/6/2013
SVC11004	1/1/2014	Net 30	1,859.63	2/11/2014
SVC11013	1/1/2014	Net 30	2,356.89	2/25/2014
STDINV2227	5/8/2015	Net 30	171.10	5/12/2017
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
FC20010	1/29/2015		20.00	1/23/2014
RTN20015	1/29/2015		-2,568.00	1/23/2014
STDINV2228	9/11/2016	Net 30	128.30	5/12/2017
INVS3008	4/12/2017	Net 30	938.93	10/6/2018
CREDIT0000000000002	12/31/2014		-50.00	12/31/2014
RETRN0000000000003	12/31/2014		-60.00	12/31/2014
			21,093.26	

Customer Aging

Period

Current

31 - 60 Days

61 - 90 Days

91 - 120 Days

121 - 150 Days

151 - 180 Days

181 and 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:

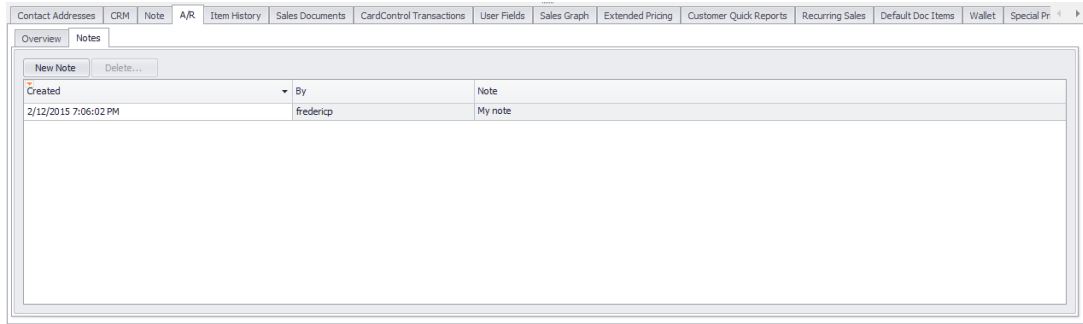
- Finance Charge
- Minimum Payment

- Credit Limit
- Maximum Writeoff

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

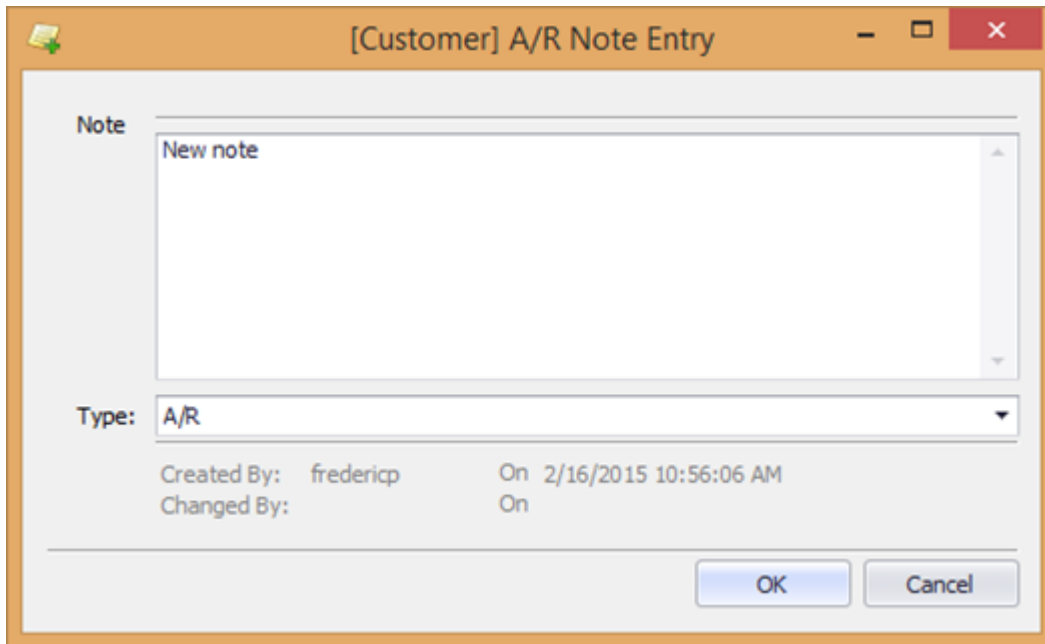
Notes Tab

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



Created	By	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.



Note

New note

Type: A/R

Created By: fredericp On 2/16/2015 10:56:06 AM

Changed By: On

OK Cancel

Settings, Security & Setup

Security

Customer A/R* - Allows users to access the Customer A/R Tab on the Customer Card.