ARKONA®

QuickStart Guide

Adding Charge Customers

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Use this QuickStart Guide for help setting up a new A/R customer.

1. Verify the customer does not already exist as a customer or vendor.

a. Take option **41=Charge Customers** from the General Ledger menu to display all the charge customers and vendors.

b. Key the first few characters of the company or last name in the Position To field and press [ENTER].

- Vendors show up in blue, inactive accounts show up in yellow.
- **If you find the company or person as a vendor**, take the following steps to convert them to an accounts receivable customer:
    1. Take option **2=Change** by their vendor number to display the Charge Customer screen.
    2. Position to the Status line and hit F4.
    3. Take option **1=Select** by Both Charge Customer and Vendor and press [ENTER] twice to save; or
    4. If you know the status code, you don't have to hit F4; you can just set Status = B and press [ENTER] twice.

2. Add the new customer.

a. Use function **F6=Add** to add a new accounts receivable customer.

b. Key in the customer's phone number and press [FIELD EXIT].

- This step is very important because the customer is likely already in the name database and it will pull their address information in for you.
- **If the phone number is found and it is tied to the customer you are adding,** take option **1=Select** by the customer name to pull in their address information.
- **If the phone number is found and it is tied to a different customer**, use function **F6=Add New Customer** to pull the phone number into the Charge Customer screen.
- **If the phone number is not found**, continue adding the customer information.

c. Enter the Customer Number.

- This step will not be required if your preference is to have the system assign customer and vendor numbers.

d. Leave the Status = C.

e. Use function **F5=Individ** if necessary to convert the screen to accept personal information rather than business information.

f. Enter the customer profile information.

g. **To change the customer type**, take the following steps:

    1. Position to the Customer Type field and hit F4.
    2. Take option **1=Select** by the customer type.

h. **To change the Payment Terms**, take the following steps:

    1. Position to the Payment Terms field and hit F4.
    2. Take option **1=Select** by the payment terms.

i. **To change the Tax Group**, take the following steps:

    1. Position to the Tax Group field and hit F4.
    2. Take option **1=Select** by the tax group.

j. Designate a credit limit.

k. Indicate whether to charge interest on this customer.

l. Press [ENTER] to save the changes and assign the new customer number.