

# Customer Constant Data

This course covers the details of the Customer Constant Data menu option.

This menu option contains a series of data fields used when processing orders for this customer. On the screen below, the information at the top is fixed as you move through the numbered screens.

- The **Customer** number is shaded as it can't be changed in this screen.
- The **Name** field has a maximum of 35 characters.
- **Bill to Customer:** Used in corporate relationships to redirect billing.

## 1. Address tab

1. Standard **Address** & Phone fields(left).
  - a. **Best Practice:** Enter the Zip code and the City and State will autofill!
2. **Lookup:** Used when looking up Customers – enter up to 10 characters.
3. **Purchasing Agent:** if applicable
4. **Greeting:** Used in electronic correspondence.
5. **Status:** Current Status of Customer.
6. **Date Setup:** Date Customer was added (Do not change!)

## 2. Setup Tab

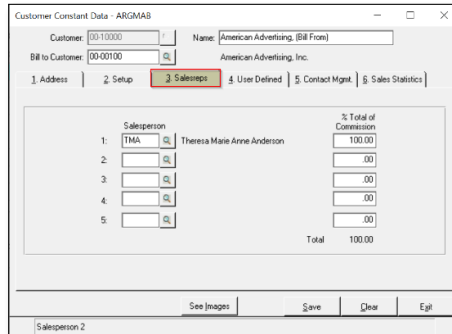
Two fields are required on this screen. The rest will not be covered in this course.

1. **Category** – Select the category as defined by your company.
2. **Sales Tax Code** – Select the Tax Code for this Customer.

### 3. Salesperson tab

Select the primary salesperson in field **1:** and enter 100.00 in the % Total of Commission field. This is the % of available commission to be received by the Salesperson.

For split commission, select the Salespersons then divide the percentage of commission accordingly. The commission paid is based on Salesperson 1's commission rate.

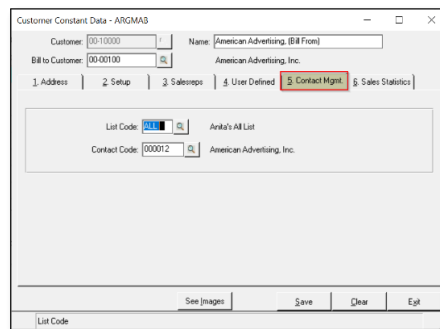


### 4. User Defined tab

Used to create additional reporting tools as defined by your customer. See document “Configure User Defined Fields’ in the DB Learning Center.

### 5. Contact Mgmt. tab

This tab links this Customer to the contact management record. See document “Contact Management” in the DB Learning Center.



### 6. Sales Statistics

Not pictured, this tab shows accumulated sales activity by period. It is updated during month end processes.

### Buttons

Along the bottom of the window:

1. **See Images** – to view images of documents.
2. **Save** – updates the record without exiting the screen.
3. **Clear** – clears the screen so a new Customer can be selected.
4. **Exit** – Closes the screen & returns to ‘Customers’ menu.