

Customer – Create View

Module: Management

Screen Type: Create View

URL: `/^management/customers/create/`

Model: Customer

Record Name: Customer

Plural Name: Customers

What This Screen Is For

TODO: Explain what this screen does in plain language.

What You See on This Screen

 *Add a screenshot of this screen.*

Fields on This Screen

Field	Type	Description
Last Modified At	Date & time	<i>TODO</i>
Last Modified By	Relationship (single) (optional)	<i>TODO</i>
Customer #	Text (optional)	A customer's unique ID number. Leave this field blank for the system to generate one automatically.
First Name	Text	<i>TODO</i>
Last Name	Text	<i>TODO</i>
Company	Text (optional)	<i>TODO</i>
Display As Company	Yes/No	<i>TODO</i>
Address Line 1	Text	<i>TODO</i>
Address Line 2	Text	<i>TODO</i>

Field	Type	Description
City	Text	<i>TODO</i>
State	Text	<i>TODO</i>
Zip	Text	<i>TODO</i>
Phone	Text	<i>TODO</i>
Fax	Text	<i>TODO</i>
Email	Text	<i>TODO</i>
Auto Invoice Email	Yes/No	If enabled, the system will attempt to automatically email receipts to this customer at their specified email address
Statement Email	Yes/No	If enabled, the system will attempt to email statements to this customer at their specified email address
Salesperson	Relationship (single) (optional)	<i>TODO</i>
Class	Relationship (single)	<i>TODO</i>
Freight Zone	Relationship (single) (optional)	<i>TODO</i>
Freight Option	Text (choice) (optional)	<i>TODO</i>
Discount Schedule	Relationship (single) (optional)	<i>TODO</i>
Tax Code	Relationship (single)	<i>TODO</i>
Ignore Restrictions	Yes/No	If this field is enabled, the selected customer will not be subject to restrictions placed on contract-restricted items. This would be appropriate for customers who are dealers or otherwise responsible for dealing with purchase restriction regulations.
Creditlimit Currency	Text (choice)	<i>TODO</i>
Credit Limit	Number (decimal)	<i>TODO</i>
Credit Hold	Yes/No	If this field is enabled, the selected customer will not be allowed to charge or purchase items by check regardless of balance and credit limit. They will still be allowed to make cash and credit/debit card purchases.
Receivable Account	Relationship (single)	<i>TODO</i>
Accountbalance Currency	Text (choice)	<i>TODO</i>
Account Balance	Number (decimal)	<i>TODO</i>

Field	Type	Description
Written Off	Yes/No	If this field is enabled, the selected customer will be treated as a bad debt. They will no longer accrue finance charges or be included in batch statement printing.
Payment Terms	Relationship (single)	<i>TODO</i>
Account Number	Text (optional)	An optional field that allows storage of a legacy customer account number or other identifying account information
Allow Cash Discount	Yes/No	If this field is disabled, this customer will not be allowed to receive cash discounts or early payment discounts.
Free On Board	Text (choice) (optional)	<i>TODO</i>
Laborrates Currency	Text (choice) (optional)	<i>TODO</i>
Labor Rate	Number (decimal) (optional)	Sets the default labor rate for the service customer in the service module
Display Name	Text (optional)	<i>TODO</i>
Preferred Tender	Text (choice)	The customer will have this payment method selected by default when making a sale.
Detailed Statements	Yes/No	If this field is enabled and an appropriate statement template is being used, the selected customer will receive line item detail on their monthly statements.
Payment Gateway Id	Text	Stores the unique customer ID from the payment gateway

System Fields (Managed Automatically)

⚙️ These fields are managed by the system and usually do not need to be edited.

Field	Type	Description
Id	Auto number (ID)	<i>TODO</i>
Created At	Date & time	<i>TODO</i>
Created By	Relationship (single) (optional)	<i>TODO</i>
Custom Fields	Extra Fields JSONField	<i>TODO</i>
Deleted At	Date & time (optional)	<i>TODO</i>

Common Tasks

- *TODO*
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Tips & Helpful Hints

☐ *TODO*

Who Uses This Screen

- *TODO*

Related Screens

- **List View** — [management-customers](#)
 - **Detail View** — [management-customers-id](#)
 - **Update View** — [management-customers-id-update](#)
 - **List View** — [management-pos-customer-list](#)
 - **Create View** — [service-customers-create](#)
 - **Update View** — [service-customers-id-update](#)
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Advanced Notes

TODO

Revision #1

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