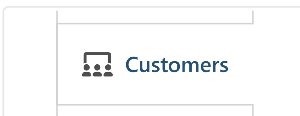
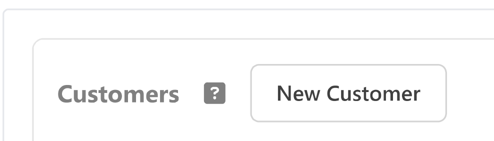
Customers

The **Customers** tab in Manager.io allows you to add, organize, and manage the details of all your business's customers. Here, you can view information like the customer's code, name, email, billing address, and more. Additionally, this tab provides access to financial information about your customers, including their transaction history, balances, and credit limits.



Adding a New Customer

To add a new customer, click the **New Customer** button.



For more information on adding or editing customer details, see Customer — Edit.

Understanding Customers in Manager.io

A **Customer** in Manager.io refers to an individual, business, or organization from whom you expect to receive or already receive payment, indicating an **Accounts Receivable** relationship. You don't need to set up someone as a customer for every sale. If a sale is paid for in cash immediately, you can process it without having to create a customer.

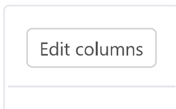
When a customer is created, their starting balance is zero. If migrating from another accounting system, enter unpaid invoices for this customer under the **Sales Invoices** tab.

- **Enter unpaid invoices individually**: This ensures you can start issuing customer statements in Manager.io from day one.
- **Accurate financial and tax reporting**: When invoices are paid, Manager.io will correctly reflect them on your financial statements and tax reports if using cash-basis accounting.

- **Handling customer credits**: If the customer has no unpaid invoices and instead has a credit, you can create a credit note under the **Credit Notes** tab.

Customer Tab Columns

The **Customers** tab features several columns that provide detailed information about each customer. You can customize which columns are visible by clicking the **Edit columns** button.



For more information, see **Edit columns**.

Below is a description of each column:

Code

The **Code** column displays the customer code.

Name

The **Name** column displays the name of the customer.

Email address

The **Email address** column displays the customer's email address.

Control account

The **Control account** column displays the customer control account. By default, each customer is assigned to the **Accounts receivable** control account. However, users can create custom control accounts under **Control Accounts**. See **Control Accounts** for more information.

Division

The **Division** column displays the customer's division when using divisional accounting. See **Divisions** for more information.

Billing address

The **Billing address** column displays the customer's billing address.

Delivery address

The **Delivery address** column displays the delivery address of the customer.

Receipts

The **Receipts** column displays the number of receipts linked to a customer. By clicking on the number, you will be redirected to the **Receipts** tab. See Receipts for more information.

Payments

The **Payments** column displays the count of payments, which are typically refunds, associated with a customer. By clicking on the number, you will be redirected to the **Payments** tab. See Payments for more information.

Sales Quotes

The **Sales Quotes** column displays the number of sales quotes issued to customers. Clicking on the number directs you to the **Sales Quotes** tab.

Sales Orders

The **Sales Orders** column displays the count of sales orders created for a customer. Clicking on the number directs you to the **Sales Orders** tab.

Sales Invoices

The **Sales Invoices** column displays the number of sales invoices issued to a customer. Clicking on the number redirects you to the **Sales Invoices** tab.

Credit Notes

The **Credit Notes** column displays the number of credit notes issued to a customer. Clicking on this number directs you to the **Credit Notes** tab.

Delivery Notes

The **Delivery Notes** column displays the number of delivery notes issued to the customer. Clicking on the number redirects you to the **Delivery Notes** tab.

Qty to deliver

The **Qty to deliver** column shows the quantity to deliver across all inventory items for the customer. Clicking on the figure will display a list of inventory items. See Customers — Qty to deliver for more information.

Uninvoiced

If you're utilizing **Billable Time** or **Billable Expenses**, the **Uninvoiced** column displays the total amount of billable time and expenses for the customer that have not yet been invoiced.

Accounts receivable

The **Accounts receivable** column displays the balance of what customers owe in their **Accounts receivable** account. This amount usually increases with sales invoices and decreases with receipts and credit notes.

Withholding tax receivable

If your customers withhold tax from your payments, the **Withholding tax receivable** column displays the total amount that has been withheld but not yet paid to the tax authority by the customer.

Status

The **Status** column reflects the balance status of the customer:

- **Paid**: If the balance in **Accounts receivable** is zero.
- **Unpaid**: If there is an outstanding balance owed by the customer.
- **Overpaid**: If the customer has paid more than the outstanding balance.

Available credit

If you've entered a value for **Available credit** on the customer form, the **Available credit** column displays the remaining credit available to the customer.

Filtering and Sorting Customers

To filter, sort, and group customers, utilize the **Advanced Queries** feature within the **Customers** screen. For instance, when utilizing the **Billable Time** tab, you can filter the customer list to show only those with an **Uninvoiced** amount:

Select

Name	Uninvoiced

Where...

Uninvoiced	is not empty

This is just one example; there are many other possibilities for what you can do. See Advanced Queries for more information.

By effectively managing your customers in Manager.io, you can maintain accurate records, streamline your invoicing process, and ensure you have up-to-date financial information for better business decisions.