Customer — Edit

The **Customer Edit** form in Manager.io is where you can create new customers or modify existing ones. This guide will walk you through each field available in the form and explain how to use them effectively.

Name

Enter the customer's name. This is a required field and will be used to identify the customer throughout the system.

Code (Optional)

Optionally, enter a customer code. Assigning codes allows you to search for customers by either name or code in dropdown menus where you need to select a customer. This can be helpful for quickly finding customers, especially if you have many.

Credit Limit

Set the total credit limit for how much a customer can purchase on credit. To monitor the remaining credit before creating new invoices, ensure the **Available Credit** column is enabled in the **Customers** tab.

Currency

Assign a foreign currency to customers who operate in a different currency from your base currency. By default, all customer accounts are in your base currency. Selecting a foreign currency means all transactions for this customer—such as quotes, orders, invoices, and credit notes—will be issued in that currency.

Note: This option appears only if foreign currencies have been created in the system.

Billing Address

Enter the customer's billing address. This address will automatically fill in when creating new invoices, orders, quotes, or credit notes for this customer.

Delivery Address

If you're using the **Delivery Notes** tab, enter the customer's delivery address here. This address will auto-fill when creating new delivery notes for the customer.

Email

Enter the customer's email address. This will automatically fill in when emailing the customer directly from Manager.io.

Division

If **Divisions** are enabled in your system, assign the customer to a specific division. This helps in organizing customers based on different segments of your business. This option will not appear if no divisions have been set up.

Control Account

If you're using custom control accounts for **Accounts Receivable**, select the associated control account for this customer. This allows you to categorize receivables according to your accounting structure. This option is not visible if custom control accounts are not in use.

Autofill Options

Sales Invoice — Due Date

Set a default due date for each customer if you're using the **Sales Invoices** tab. This is useful for customers with varying credit terms.

Note: If all your customers share the same credit terms, consider using form defaults on sales invoices to configure default credit terms once, rather than for each customer individually.

Billable Time — Hourly Rate

Set a default hourly rate for each customer if you're using the **Billable Time** tab. This is helpful when charging different rates to different customers.

Note: If all your customers are charged the same hourly rate, use form defaults on billable time to configure the default hourly rate once instead of for each customer.

Inactive

Mark the customer as inactive to prevent them from appearing in dropdown menus throughout the system. This is useful for customers you no longer do business with but want to keep their records for historical purposes.

Additional Information

Custom Fields

Depending on your business needs, you can collect additional information about your customers by setting up custom fields. These fields allow you to record extra details that are not covered by the standard fields.

For more information, see **Custom Fields**.

Customers Who Are Also Suppliers

If a customer is also a supplier, you should create two separate entries: one under the **Customers** tab and another under the **Suppliers** tab. This ensures accurate tracking of transactions in both accounts receivable and accounts payable.

Handling Barter Transactions

In situations where unpaid sales invoices should offset unpaid purchase invoices (bartering), you have two options:

1. **Credit and Debit Notes**
    - Enter a new credit note under the **Credit Notes** tab to reduce the customer balance.
    - Enter a new debit note under the **Debit Notes** tab for the same amount to reduce the supplier balance.
2. **Journal Entry**
    - Create a new journal entry under the **Journal Entries** tab.
    - Credit the **Accounts Receivable** account for the customer's amount.
    - Debit the **Accounts Payable** account for the supplier's amount.

By understanding and utilizing these fields effectively, you can manage your customer information more efficiently in Manager.io.