Customer Accounts

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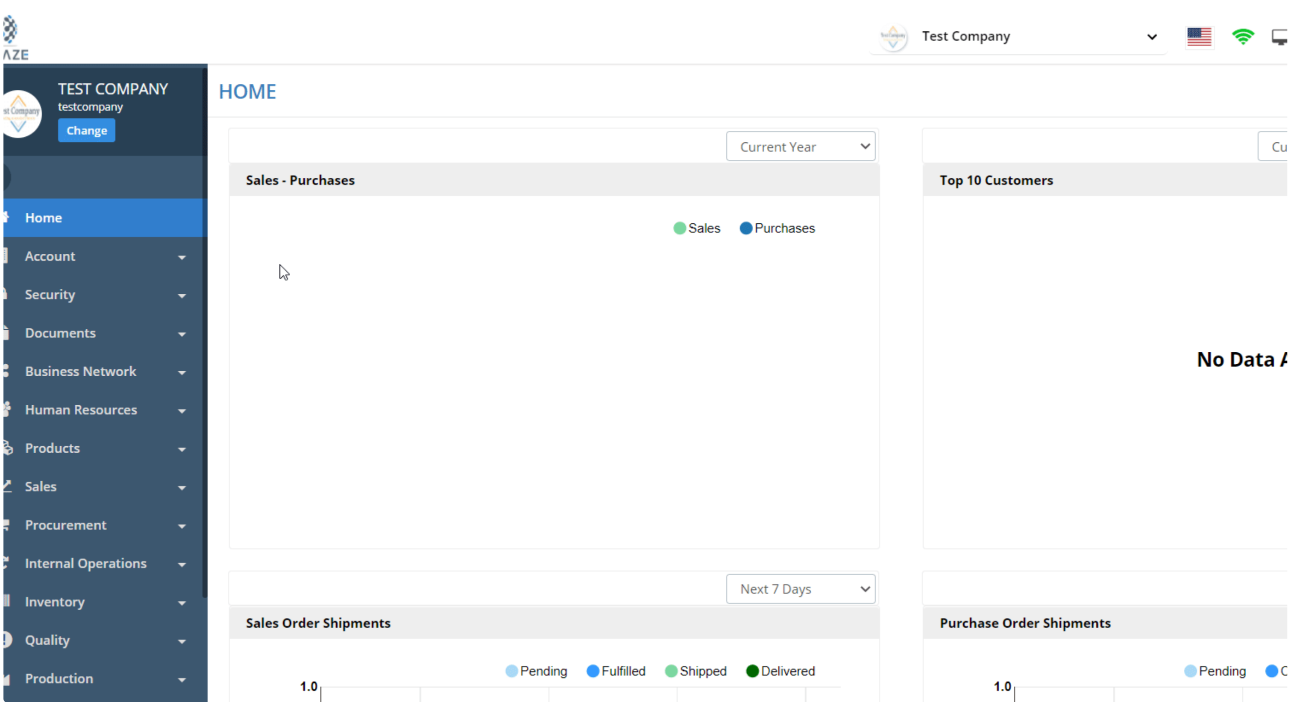
Sales

Article Navigation

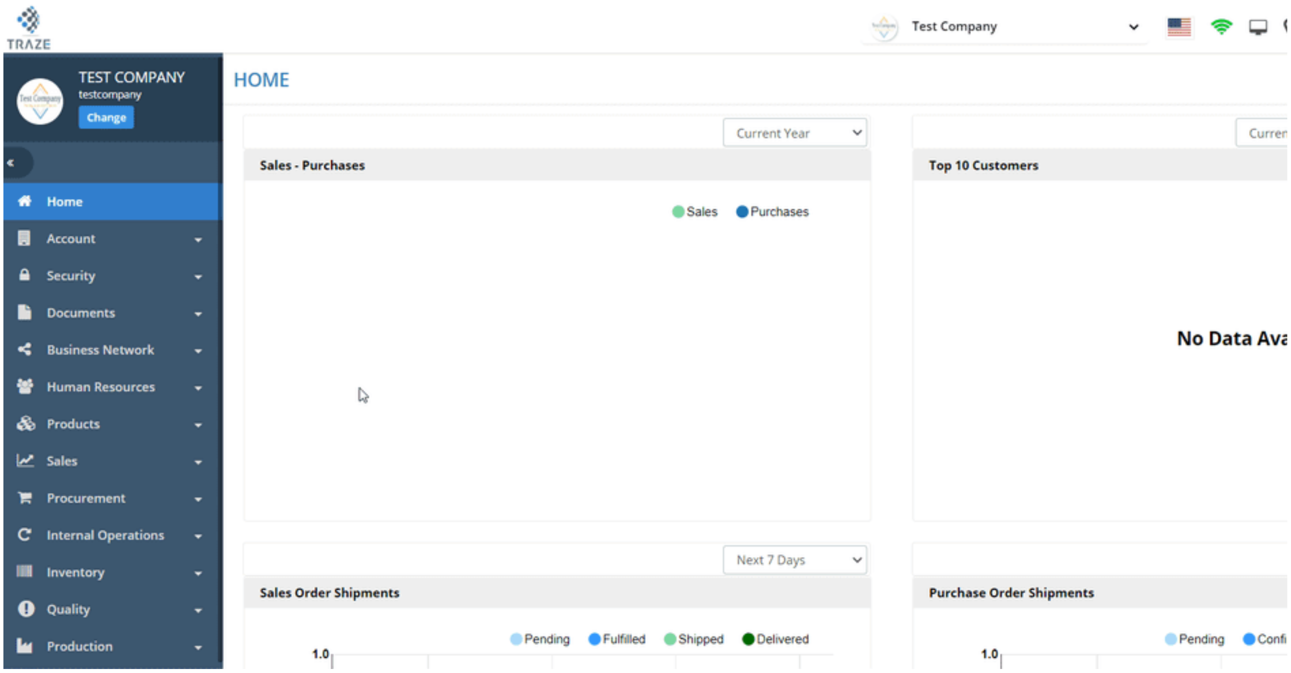
First Steps

There are two different ways to access Customer Accounts on Traze:

The first is by editing the company that the Customer Account belongs to. You do it by clicking on Business Network, then on Companies, then on the pencil to edit the chosen company, and finally in the Accounts tab you'll be able to create and edit Customer Accounts. This process is illustrated below:



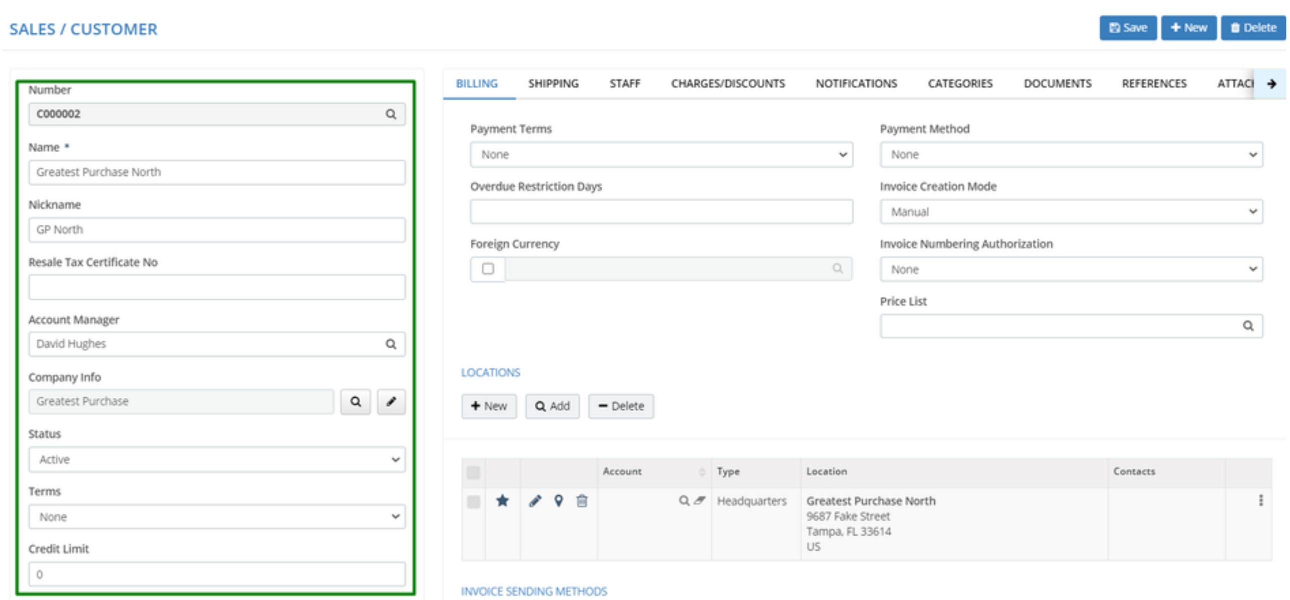
The second is a simpler way, which takes you directly to Customer Accounts, skipping the Company step. You do it by clicking on Sales, and then Customer Accounts. This process is illustrated below:



It's useful to enable this second way to access Customer Accounts for a Sales team, for example, so that they can access Customer Accounts **directly** without needing to worry about learning the ins and outs of Companies versus Accounts, and most importantly, *without being able to interfere with sensitive Company data.*

Creating a Customer Account

To begin creating, click on "+New". You will find the following section:

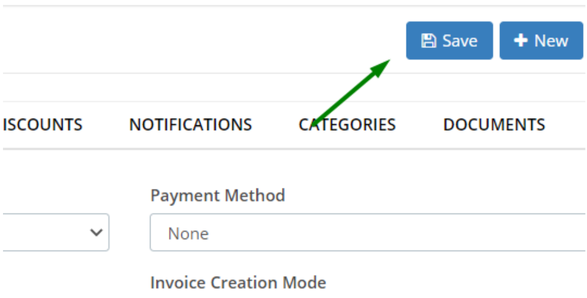


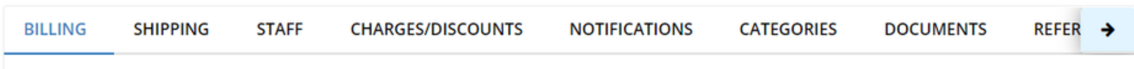
Only the fields with an asterisk are required, but we will go over the most common fields used for a basic setup:

- **Number:** This field is completed automatically by Traze when you save the Customer Account.
- **Name:** It should identify this specific location versus others under the same company.
- **Nickname:** A simple, recognizable name that will be used on Traze to represent this Account. You define the nomenclature for this Nickname.
- **Resale Tax Certificate Number:** If it applies (only for authorized resellers).
- **Account Manager:** The salesperson who is responsible for this account. Click on the magnifying glass to select the salesperson from the list. (Add people to the list by going to “Business Network → Contacts”, or when creating the Company, on the Staff tab).
- **Company Info:** This is where you associate the Account with a Company*. Click on the magnifying glass to select one from the list of created Companies.
- **Shipping Terms:** Select shipping terms. This topic is explained in further detail in its own article, here.
- **Credit Limit:** Traze will not allow any more transactions with this account once this limit is reached.

*If you are creating the Customer Account through the “Sales → Customer Accounts” path, you **must** assign a Company to it. Otherwise, Traze will assume you are creating a Company.
When creating a Customer Account through “Business Network → Companies”, the Company field will be completed automatically.

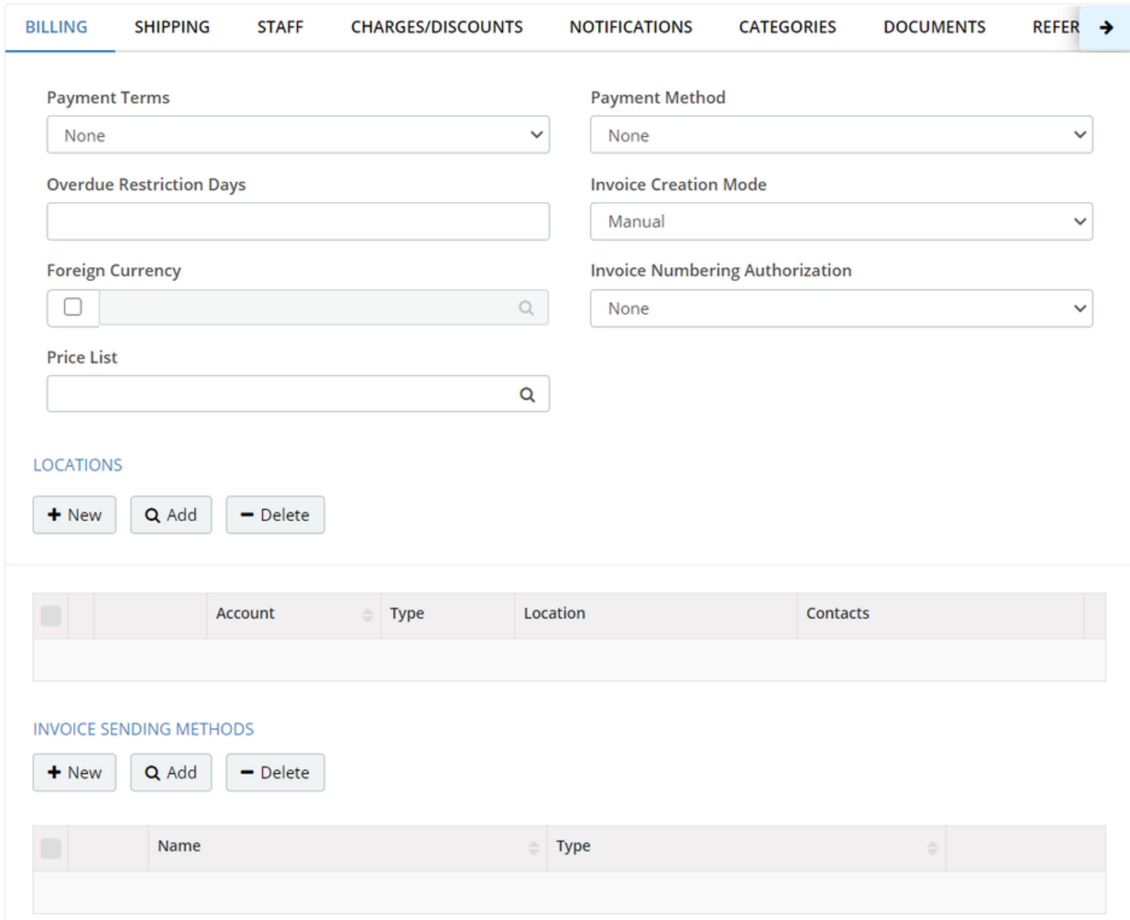
Remember to click on Save before you continue:





Each of these tabs allows you to provide more detailed information about the Account on Traze. Let’s go over the most common ones for a basic setup:

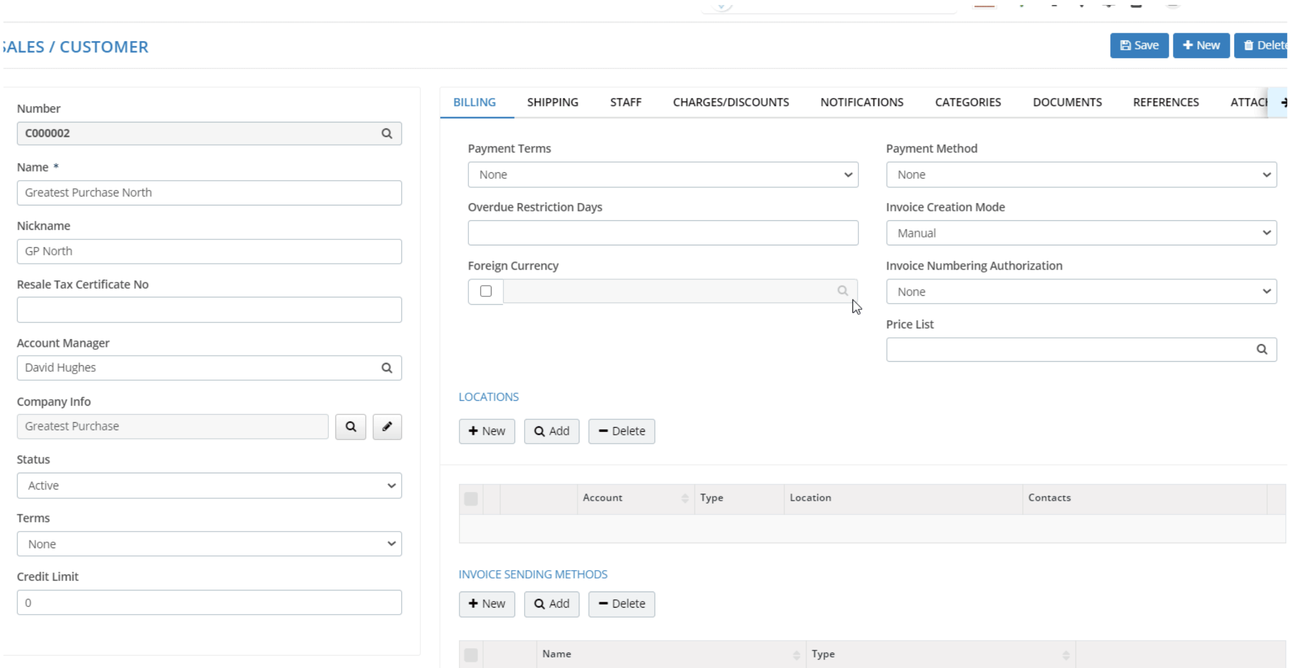
BILLING



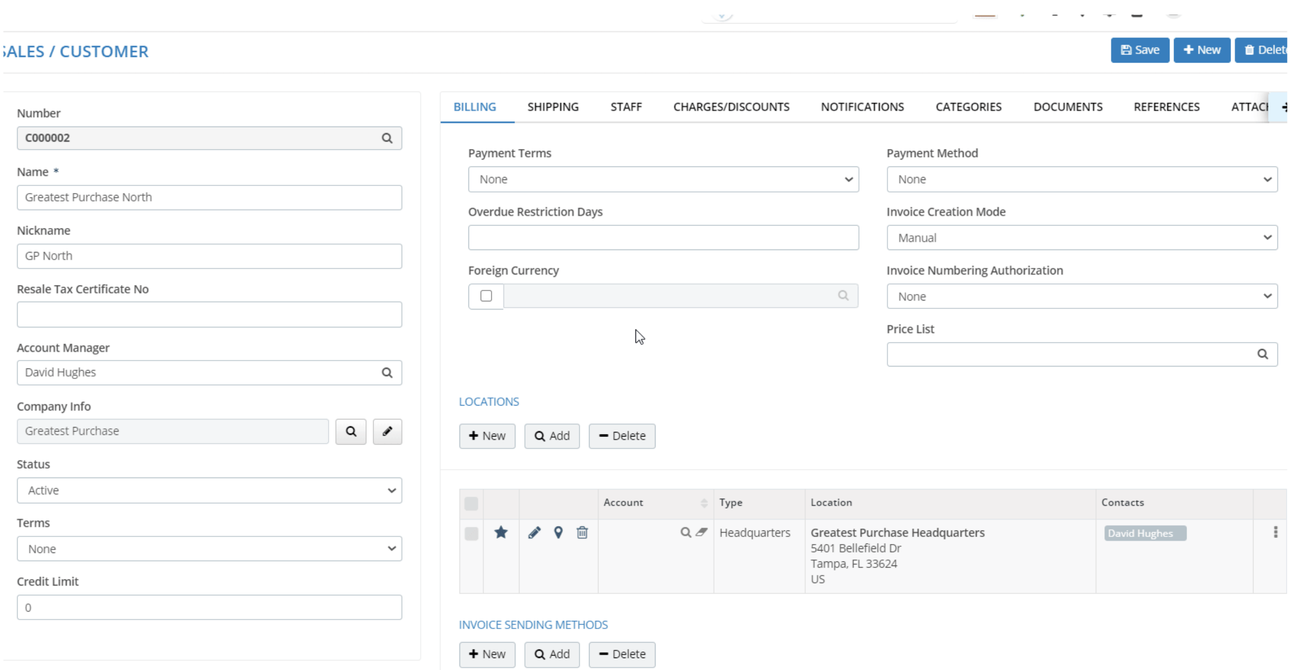
The fields that should be filled in this section are:

- **Payment Terms:** Select the Payment Terms from the dropdown list. These terms must be created beforehand, and are explained in detail in their own article.
- **Overdue Restriction Days:** Traze blocks new sales from being made if the account has unpaid invoices that are past due by the number of days chosen here.
- **Foreign Currency:** If the transactions between your company and the account are made in a different currency, this is where you can indicate it. Just click on the check box and then on the magnifying glass to select it.
- **Payment Method:** This is where you define how the Customer Account pays you. These methods must be created elsewhere, and are explained in detail in their own article. COMING SOON
- **Invoice Creation Mode:** This selection overrides the Company default. Choose between manual and automatic (once an order is shipped an invoice is created automatically).
- **Invoice Numbering Authorization:** This is a feature used in certain countries, where government tax-collecting entities emit ranges of invoice numbers that companies can use.
- **Price List:** This feature is used by companies that change their prices regularly, usually according to market prices. It allows you to associate certain price lists with specific accounts. Select the price list from the dropdown list. These lists must be created beforehand, and are explained in detail in their own article. COMING SOON
- **Locations:** The shipping address for the Account is selected here. You can choose a previously entered Location (at the Company level) by clicking on “Add”, or create one by clicking on “+New”. Both options are illustrated below.

Adding a previously entered Location:



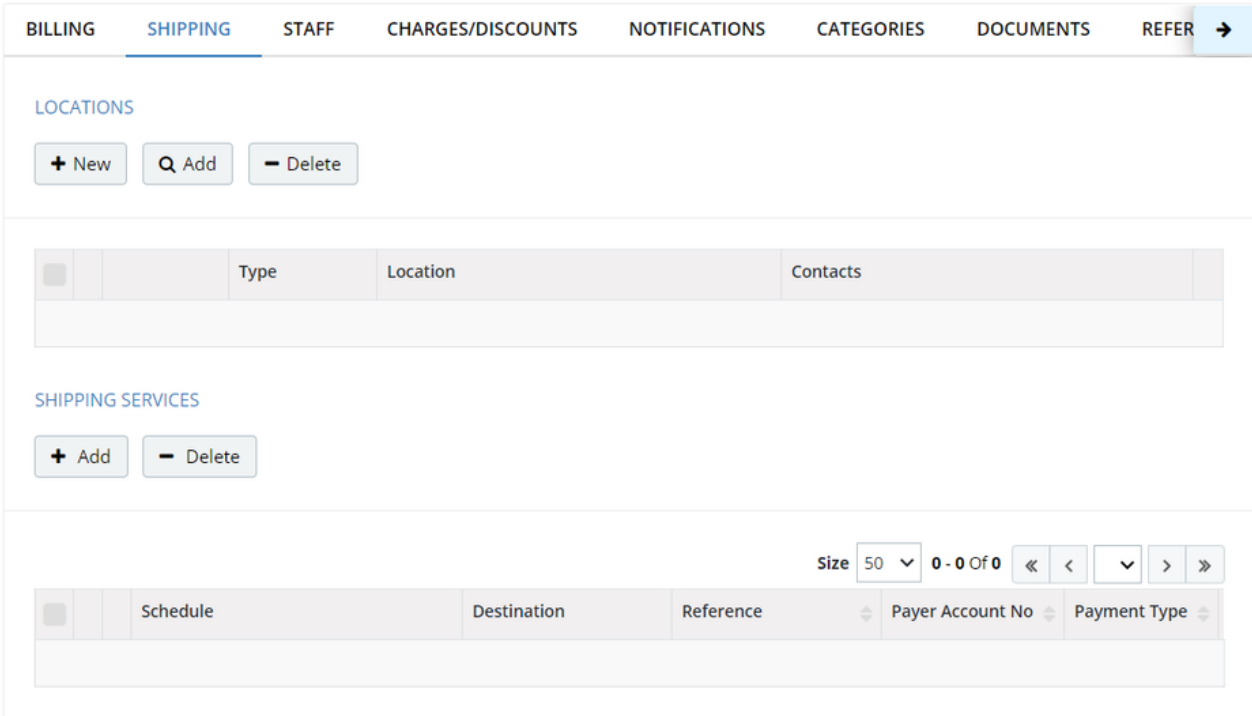
Creating a new billing address:



If it’s more convenient, you can make the billing address exactly the same for all Customer Accounts under a single Company.

SHIPPING

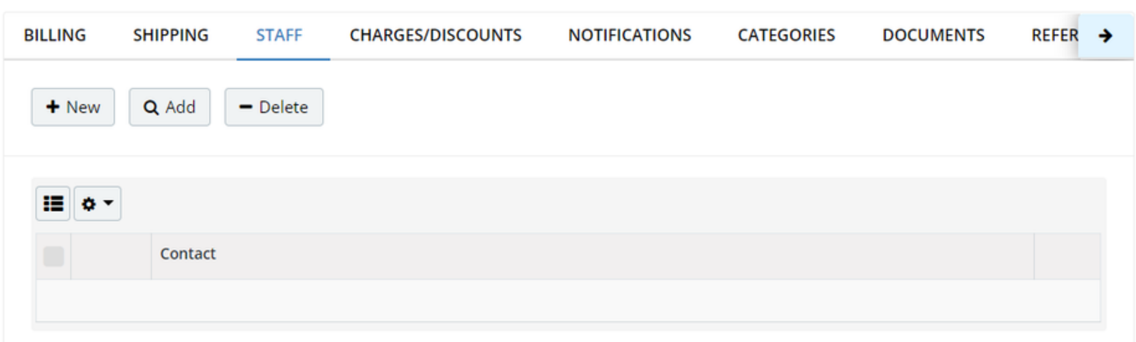
When you click on the shipping tab, you find the following panel:



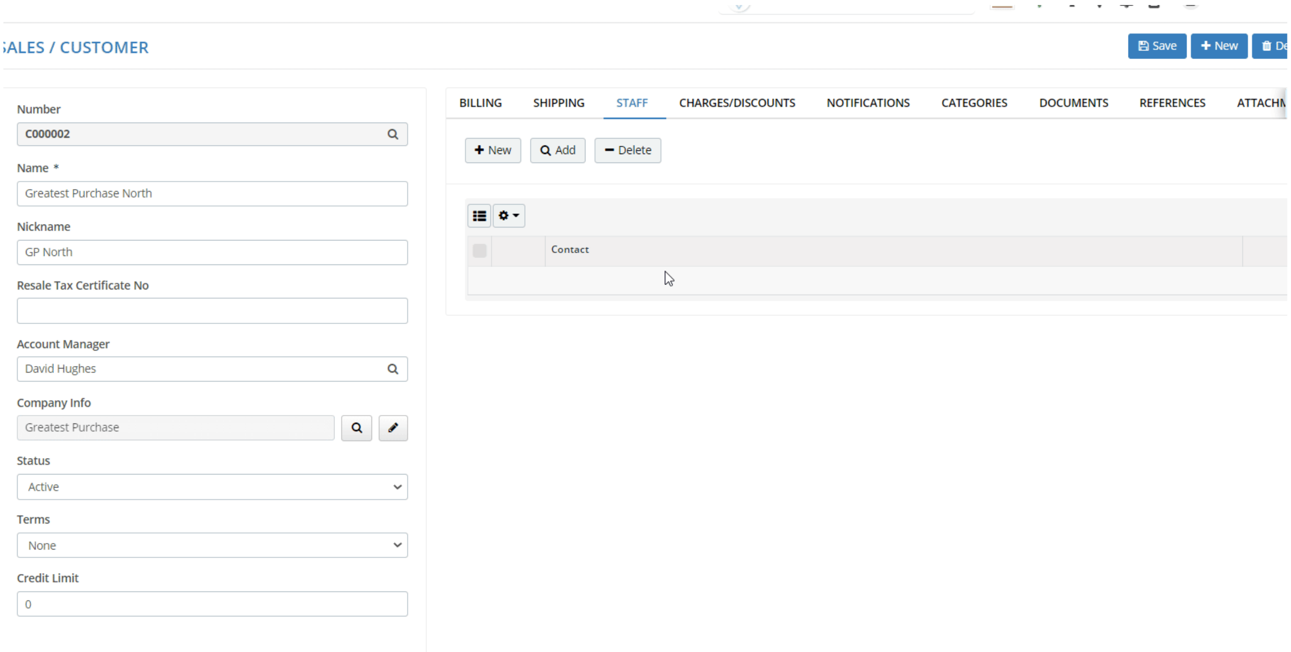
- **Locations:** The same process as above for the billing address can be followed here to select or add a new shipping address.
- **Shipping Services:** Click on “+Add” to select a Shipping Service from the list. Shipping Services must be created previously elsewhere, and are explained in detail in their own article. COMING SOON

STAFF

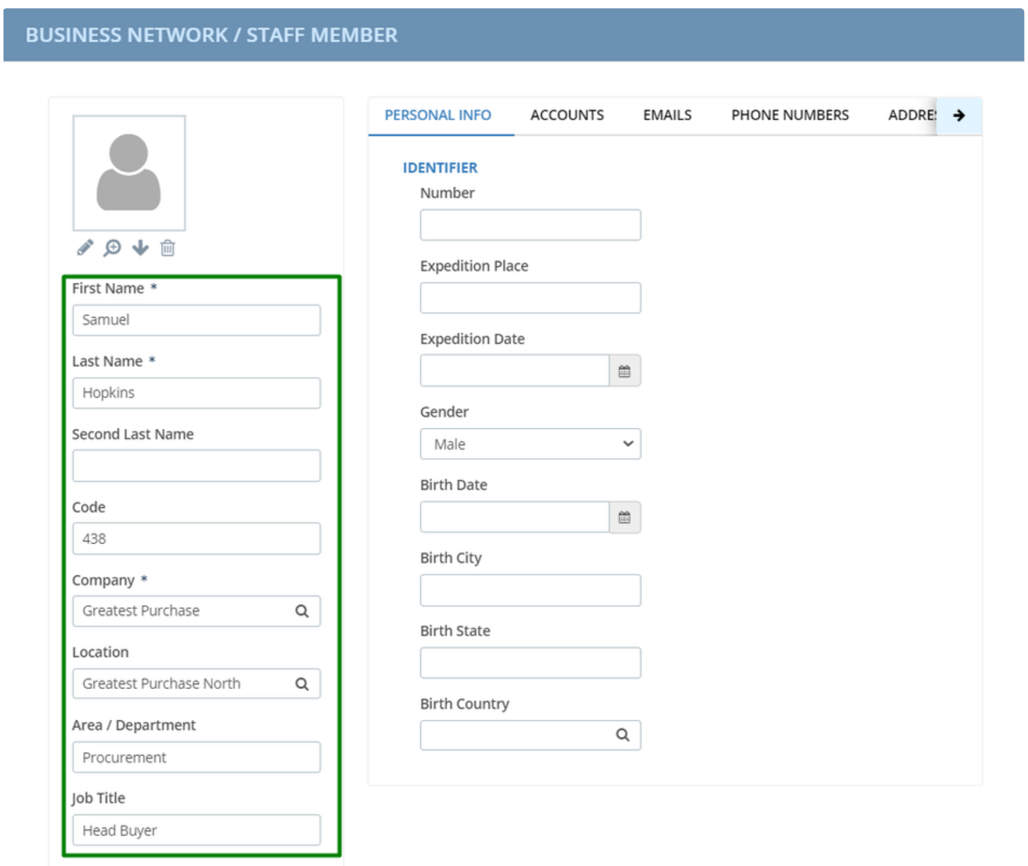
When you click on the Staff tab, you will find the following section:



Click on “Add” to choose from contacts already created in the company to add staff members to the account.



You can also choose to create a new staff member, just click on “+New” and you’ll find the following section:

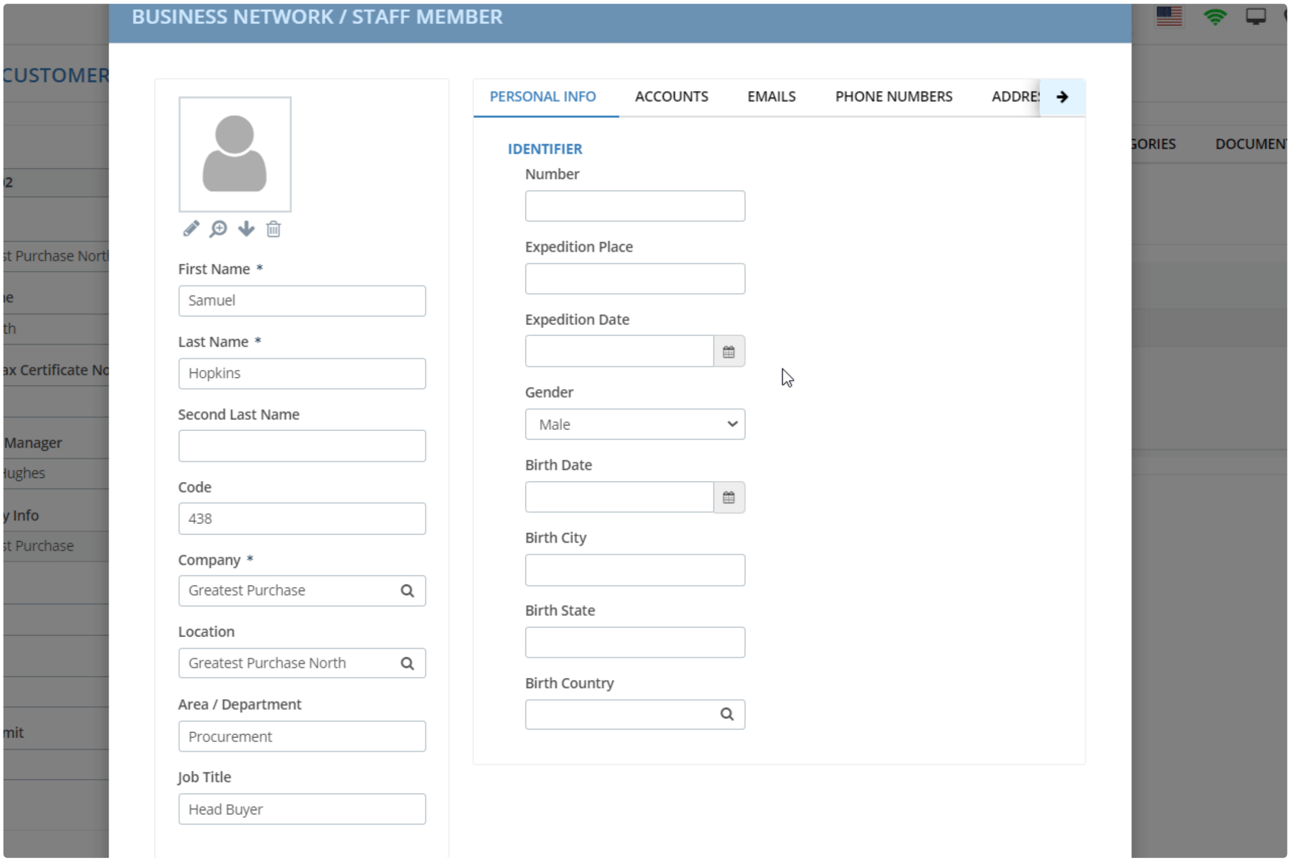


Here you can fill out the following fields:

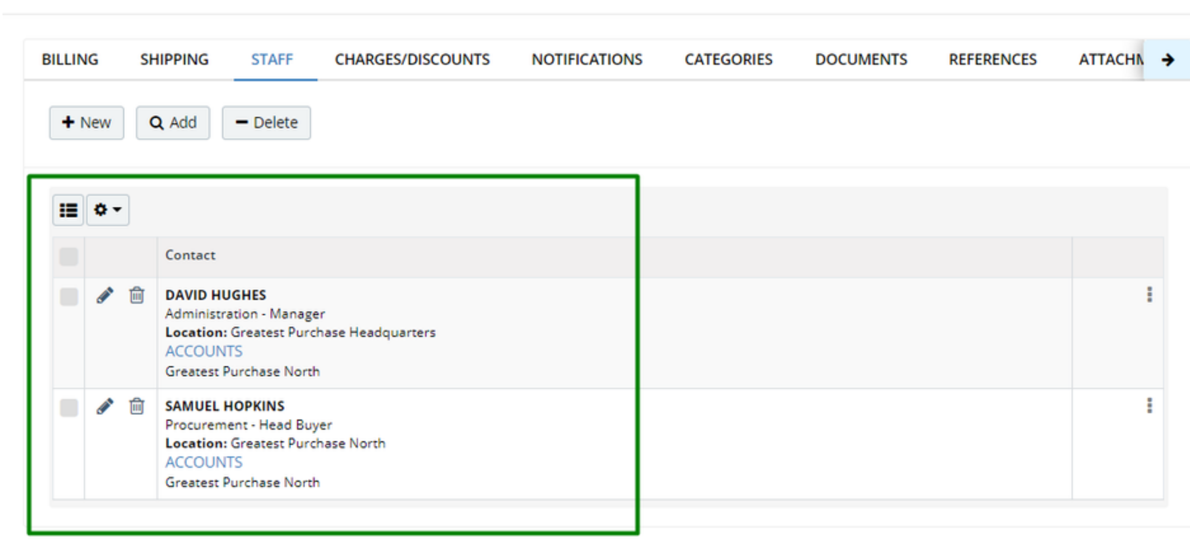
- **First Name/Last Name:** Complete according to the person’s data.
- **Code:** If the company assigns a code to identify staff members, this is where it goes.
- **Company/Location:** These fields are filled automatically by Traze, but you can edit them by clicking on the magnifying glass.

- **Area/Department:** Complete according to the person's data.
- **Job Title:** Official title assigned in the company.

You can then proceed to fill out all of the personal information on the right, as is shown below:



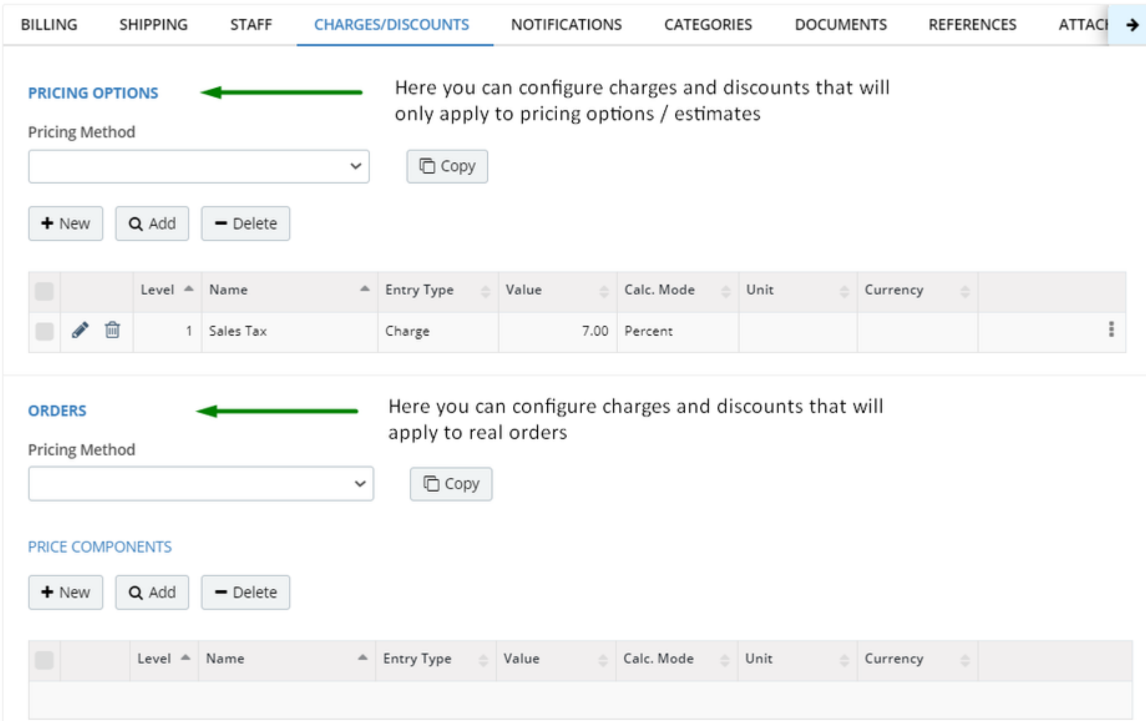
Once you click on save, you'll be able to see all the added and created staff members on the list in the Staff tab.



When a contact is created under an Account, it's automatically added to the Company's staff list.

CHARGES/ DISCOUNTS

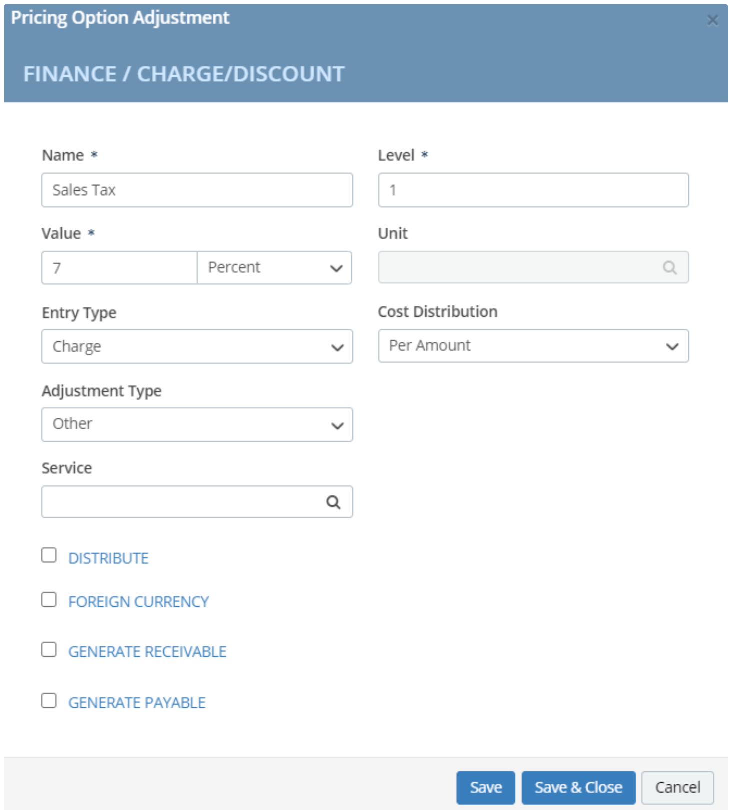
In this tab you can define exactly what happens to the transaction every time you interact with this Account. You can add personalized discounts and charges that are applied only to this Account:



The first title we find under the Charges/Discounts tab is “Pricing Options”. As the image explains, this section allows us to create discounts and charges that are applied to all estimates that can be provided to the customer, so that they are realistic.

The second title is “Orders”. Any charges and discounts that you add under this title will be applied to real orders for this account.

Let’s see how to create a Charge or a Discount. This process is identical under “Pricing Options” and “Orders”. Under either title, click on “+New” and you’ll find the following section:



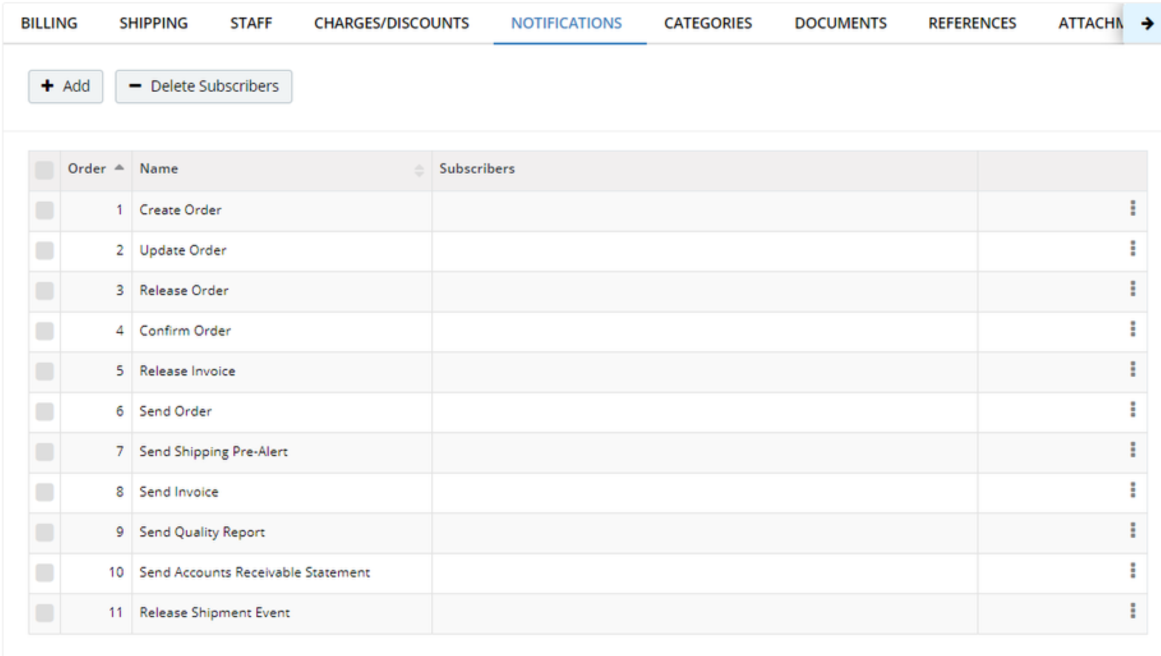
You'll be able to complete the following fields:

- **Name:** Give the charge/discount a name that is clear and concise, and will allow you to identify the charge when it's reflected on any transaction.
- **Value:** Select the unit for the charge/discount from the dropdown menu. You can choose from: percent, per container, per pack, per volume, and more. Then, when you have selected the unit, enter the amount. In our example, you can see that we chose "7 | Percent" which equals 7%
- **Entry Type:** Select whether this will be a Charge or a Discount. If it's a charge, the value will be added. If it's a discount, the value will be subtracted.
- CHECK BOXES

> ⚠ Remember, if you want a charge or a discount to appear on a real order, it must be added in the "Orders" section. *Everything added under "Pricing Options" will only exist in pricing options (quotes) and will not apply to real orders.*

NOTIFICATIONS

When you click on the Notifications tab you will find the following section:

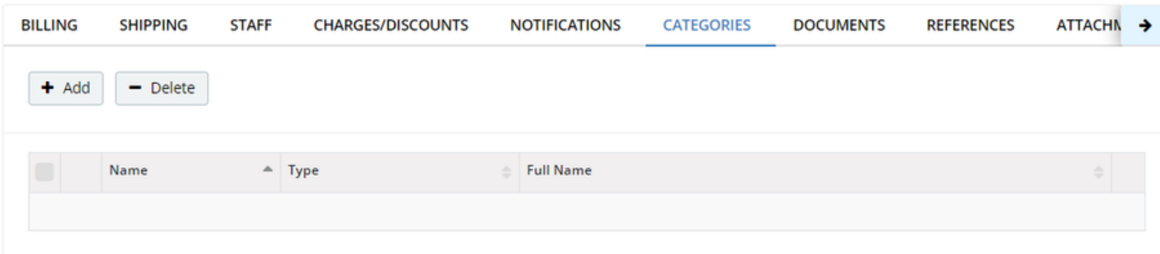


This option allows us to send a notification to any interested personnel when key actions in the supply chain are executed. People can receive a notification every time that an order is created, when it's confirmed, when an invoice is sent, and everything else found on the list above.

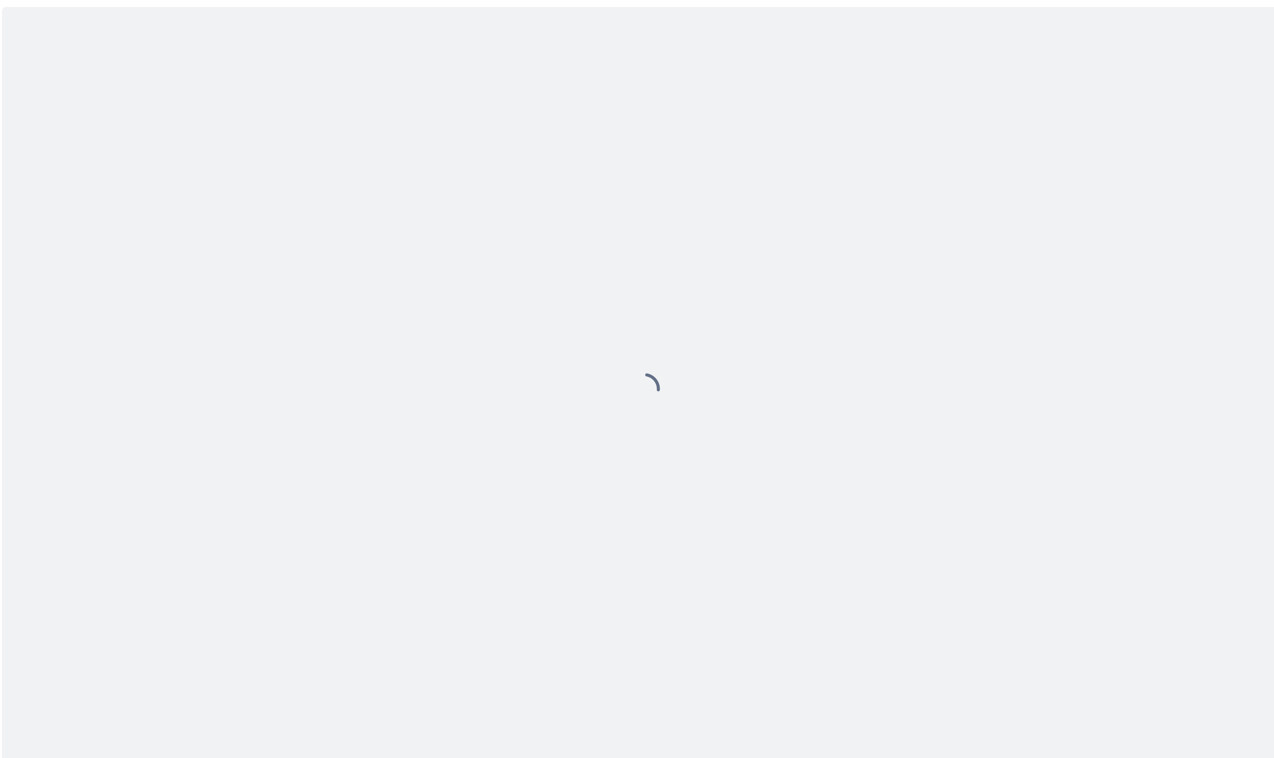
The way to set up notifications is to simply select the people who should receive them by clicking on the check box of the notification and clicking on "Add". You'll also be able to select whether the notification arrives through the Traze app, Email, or text message. This process is illustrated below:

CATEGORIES

When you click on the Categories tab you'll find the following section:



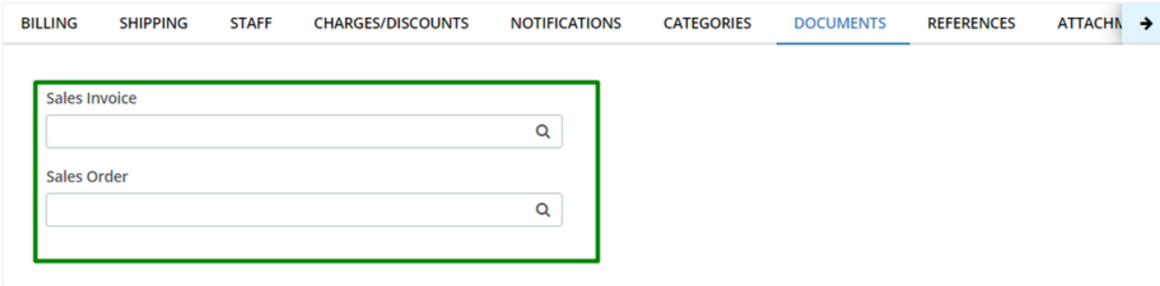
This is where you can classify the Customer Accounts as needed, and it will allow you to filter the database easily when searching for Customers. To add a category, click on "+Add" and select a category. The process is illustrated below:



These categories must be created elsewhere, and are explained in detail in their own article.

DOCUMENTS

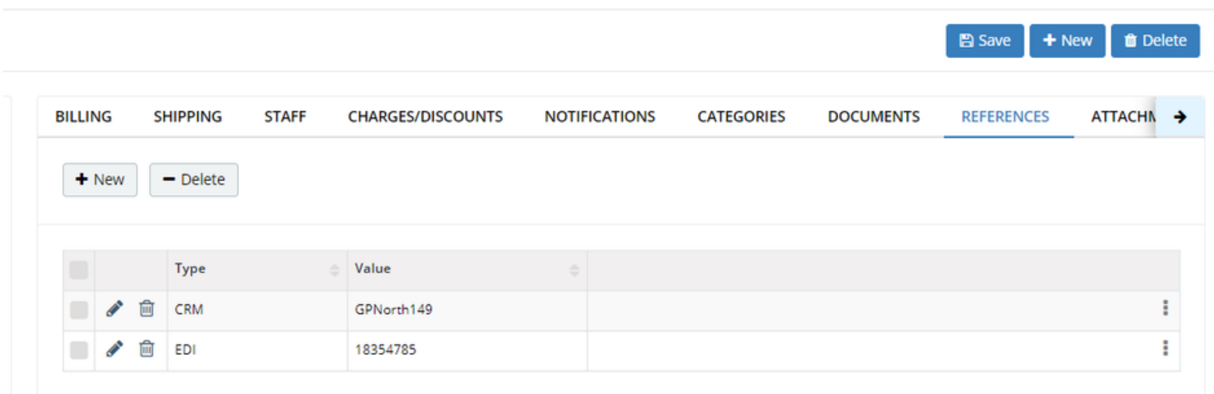
When you click on the Documents tab, you'll encounter this section:



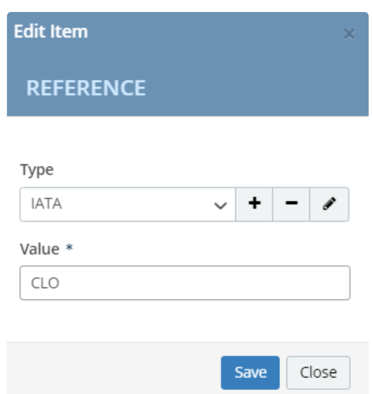
You can click on the magnifying glass under Sales Invoice or Sales Order to select the Template that will be used for these documents when associated with this account. This effectively overrides the subscription company's defaults.

REFERENCES

Click on the References tab to find the following section:



You can use References to determine the aliases under which you will identify the Customer Account for different purposes (such as external systems). To add a new Reference, click on "+New" and the following window will appear:



Click on the "+" button to create a Type (the purpose for the code) and enter the alias in the Value field. Click on save to add it to the list, as you can see below:

Save | New

BILLING | SHIPPING | STAFF | CHARGES/DISCOUNTS | NOTIFICATIONS | CATEGORIES | DOCUMENTS | REFERENCES | ATTACH

New | Delete

Type	Value
CRM	GPNorth149
EDI	18354785
IATA	CLO