

SETTING UP A NEW CUSTOMER AND SPECIAL PRICES

When you begin selling to a new customer, enter the new customer in File Maintenance and then enter the special price records needed to create automatic pricing. If you are calculating freight, a new city code might have to be set up. If the customer is in a different State, set up new tax codes and a new tax authority.

Sequence:

1. Add new Tax Codes - for customer in a new State.
2. Add new Tax Authority for the new State
3. Add City Code if calculating freight
4. Add new Freight Record for the new destination city
5. Add Customer (with new city code and tax authority, if applicable)
6. Add Special Price Records

IF THE NEW CUSTOMER IS NOT IN A NEW STATE OR COUNTY, SKIP 1 and 2.

1. Enter new **Sales Tax Codes** and **Fuel Tax Codes**

Accounts Receivable - for the Sales Tax Codes

T - Tax File Maintenance

1 - Sales Tax File Maintenance

1 - Add, Change, Delete a Sales Tax Record

(Use existing records as examples)

Jobber Inventory - for the Fuel Tax Codes

1 Master File Maintenance

13 Fuel Tax File Maintenance

1 Add, Change or Delete a Fuel Tax Record

(Use other STATE fuel tax records as examples - new Federal Tax codes not needed)

2. Enter the **Tax Authority**

Jobber Inventory

1 Master File Maintenance

13 Fuel Tax File Maintenance

3 Tax Authority File Maintenance

(Display a similar tax authority, C - Copy and then replace incorrect codes with new ones)

IF THE NEW CUSTOMER IS IN AN EXISTING CITY FOR FREIGHT CALC, SKIP 3 & 4

3. Enter the **City Code** if a new freight table will be needed for the new customer

Jobber Inventory