

# Company

## Customize the Customer Tab for a Trading Partner

### Prerequisite:

The trading partner must have the relationship of **Customer** selected for this tab to appear.

### Where is the Customer Tab Located?

- **Company > Trading Partners > [partner name] > Customer tab**

### How and Why to Customize the Customer Tab

Save time by filling information in the Customer tab that autofills fields in the Envio application. Adding payment and freight terms is a big time saver. All fields in the Customer tab are optional.

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The screenshot shows a software window titled "Baker's FoodMart - BAKERS". The window has a menu bar with "Save and Close", "Save and New", "Save", and "Help". Below the menu bar are tabs for "General", "Contacts", "Addresses", "Customer", "Receiver", and "Memo". The "Customer" tab is selected. The form is divided into three sections: "Customer Info", "Defaults / Brokerage", and "Accounts Receivable".

**Customer Info**

CHEP Location:	<input type="text"/>	Require PO#?	<input type="checkbox"/>
Price Group:	Super Small <input type="button" value="X"/> <input type="button" value="v"/>	Print Invoices?	<input type="checkbox"/>
XRef Code:	<input type="text"/>		

**Defaults / Brokerage**

SalesPerson:	<input type="text"/> <input type="button" value="X"/> <input type="button" value="v"/>	Broker:	<input type="text"/> <input type="button" value="X"/> <input type="button" value="v"/>
Freight Rate:	<input type="text"/>	Broker Rate:	<input type="text"/>
Payment Terms:	N10D <input type="button" value="X"/> <input type="button" value="v"/>		
Freight Terms:	DEL <input type="button" value="X"/> <input type="button" value="v"/>		

**Accounts Receivable**

Credit Limit Amount:	<input type="text" value="75,000.00"/>
Credit Status:	<input type="text" value="1MXXXXAB"/>
GL Account:	<input type="text"/> <input type="button" value="v"/>

- **Customer Info:** The **Price Group** is required for Price Schedules.
- **Defaults/Brokerage:** Select the **Payment** and **Freight Terms** to have this information auto-populate fields and forms.
- **Accounts Receivable:** The Credit Limit information is for information purposes only. It will not populate anywhere else in Envio.

After any changes, click **Save and Close**.

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