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.

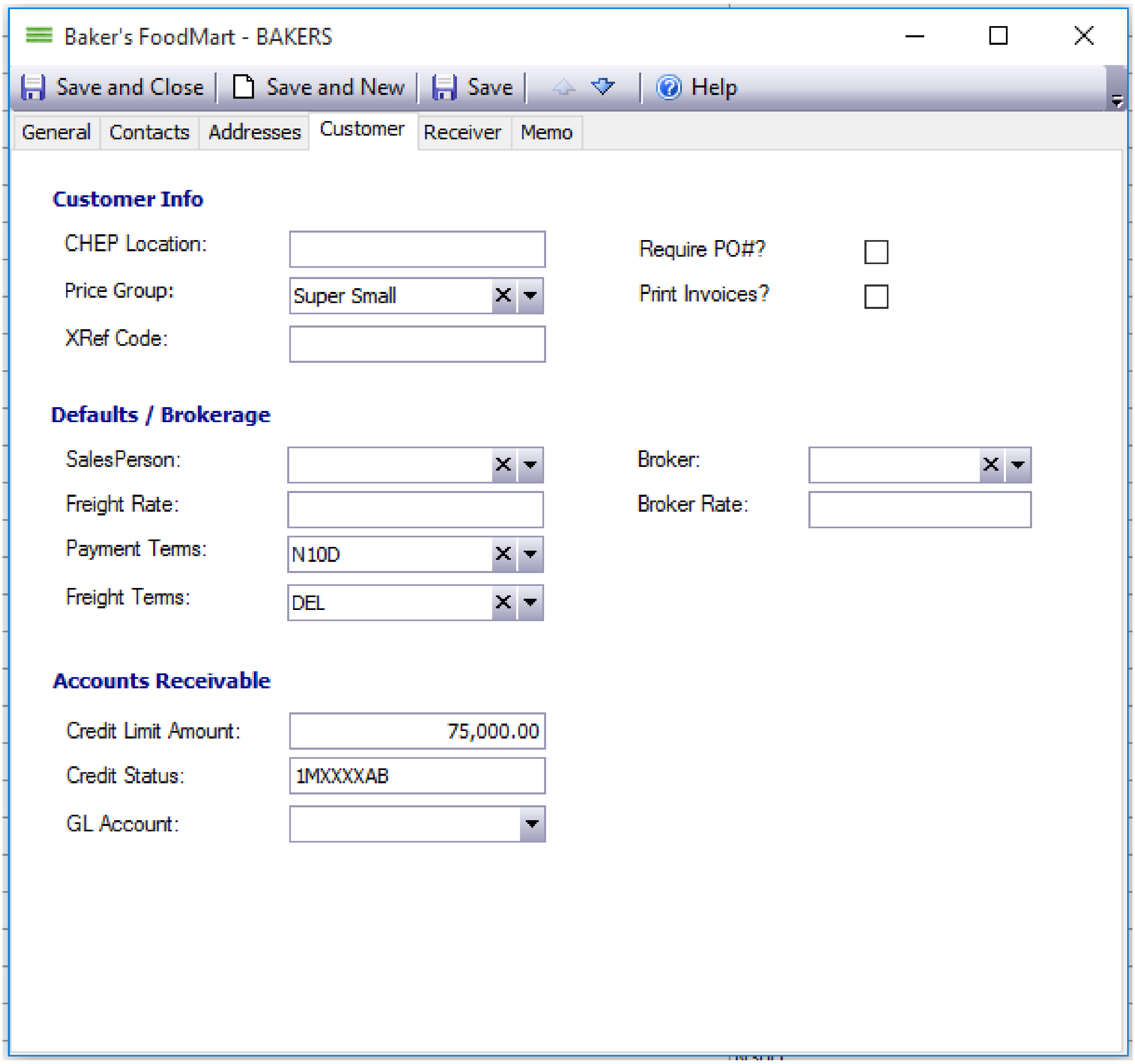
Where is the Customer Tab Located?

- **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 paymnet and freight terms is a big time saver. All fields in the Customer tab are optional.

Company



- **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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