

Customer & Supplier defaults.

Abby Picken

Sage



Housekeeping

The image shows a mobile application interface for asking questions. A dark grey sidebar on the left contains several icons: a blue flower-like logo, a red microphone icon with a slash, a question mark icon, a document icon, an information icon, and a full-screen icon. The main content area is light grey and contains the text 'Questions' at the top right, a question mark icon, and the text 'Want answers?' with a dashed arrow pointing to a text input field labeled 'Ask the staff a question'. A blue 'Send' button is at the bottom right. A dark grey 'Exit' button is at the bottom left of the sidebar. Four white callout boxes with green borders and lines pointing to the icons contain the following text:

- Your microphone is muted automatically (points to the microphone icon)
- Send us your questions (points to the question mark icon)
- Download a handout (points to the document icon)
- Switch to full screen (points to the full-screen icon)

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Introduction & Benefits.



Introduction.

When you use customer and supplier records in Sage Accounts, some information and settings may apply every time a record is used.

There are two options in which you can apply defaults:

- Applying defaults within the customer or supplier record.
 - This can be done if a particular customer has specific posting requirements.
 - **Customers > Select record > Defaults tab**
- Applying defaults from within customer or supplier defaults window this is then applied to all new records going forward.
 - **Settings > Customer or Supplier Defaults**

**Customer &
Supplier
Defaults.**

Customer Record - A1 Design Services

Clear form New invoice New order New project Delete Skype Google Maps

Details
Defaults
Credit Control
Bank

Alerts
Communications
Memo

Activity
Sales
Orders
Projects
Graph

Custom Fields

Region	North East	Analy
Analysis2		Analy
Analysis3		Analy

Pricing and Discounting

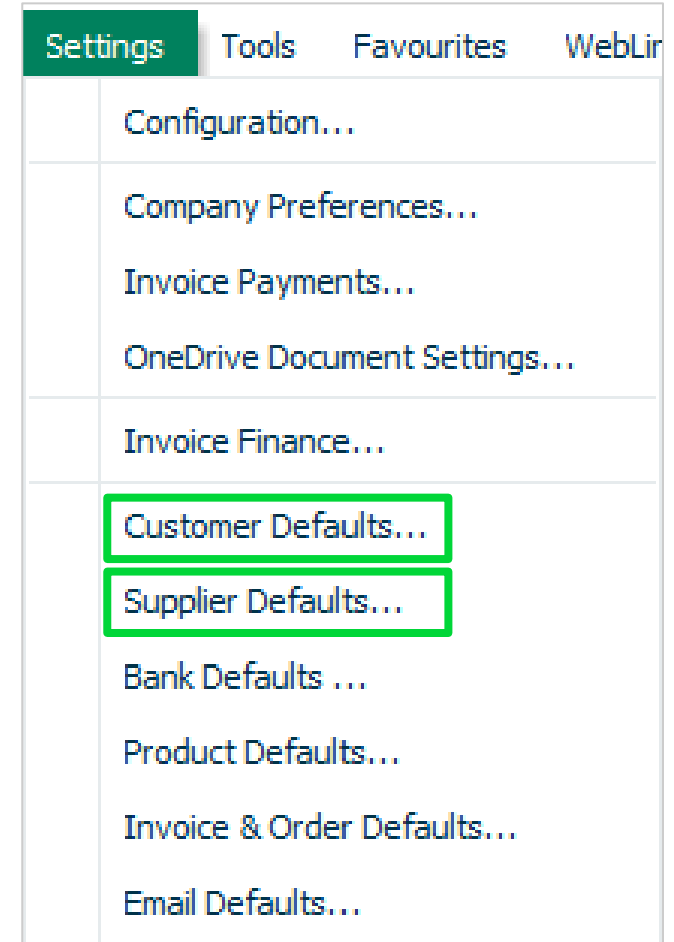
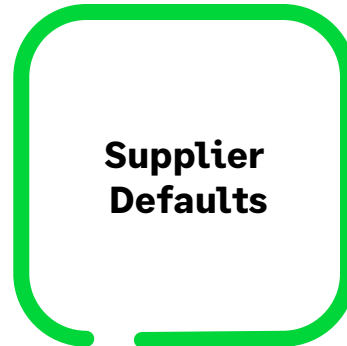
Discount %	0.00	Price List
Additional Discount	No additional	

Miscellaneous Defaults

Default Nominal Code	4000	Currency
Use Default Nominal Code for Sales	<input type="checkbox"/>	Department
Default Tax Code	T1 20.00	Reporting Passw
Use Default Tax Code for Sales	<input type="checkbox"/>	Incoterms

Benefits.

- Saves you time manually changing the information when creating new records.
- Information can be overwritten when required within the record.
 - Batch changes can be used if using **professional variant** of the software



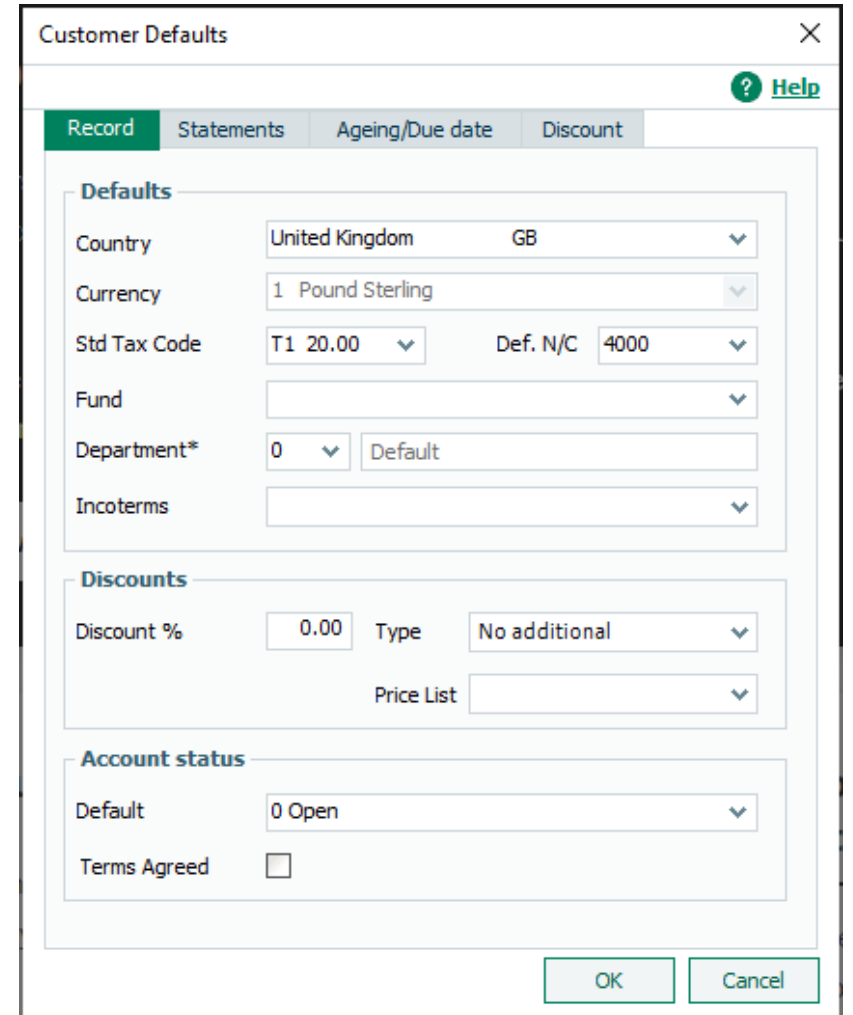
Defaults.



Customer Defaults

Settings > Customer Defaults

- Record – Enter country, tax code, nominal, departments and discount.
- Statements – Change default statement text on grouped statements.
- Ageing/due date – Specify how you want to age your customer transactions.
- Discount – set invoice value discount percentages



Customer Defaults

Record Statements Ageing/Due date Discount

Defaults

Country United Kingdom GB

Currency 1 Pound Sterling

Std Tax Code T1 20.00 Def. N/C 4000

Fund

Department* 0 Default

Incoterms

Discounts

Discount % 0.00 Type No additional

Price List

Account status

Default 0 Open

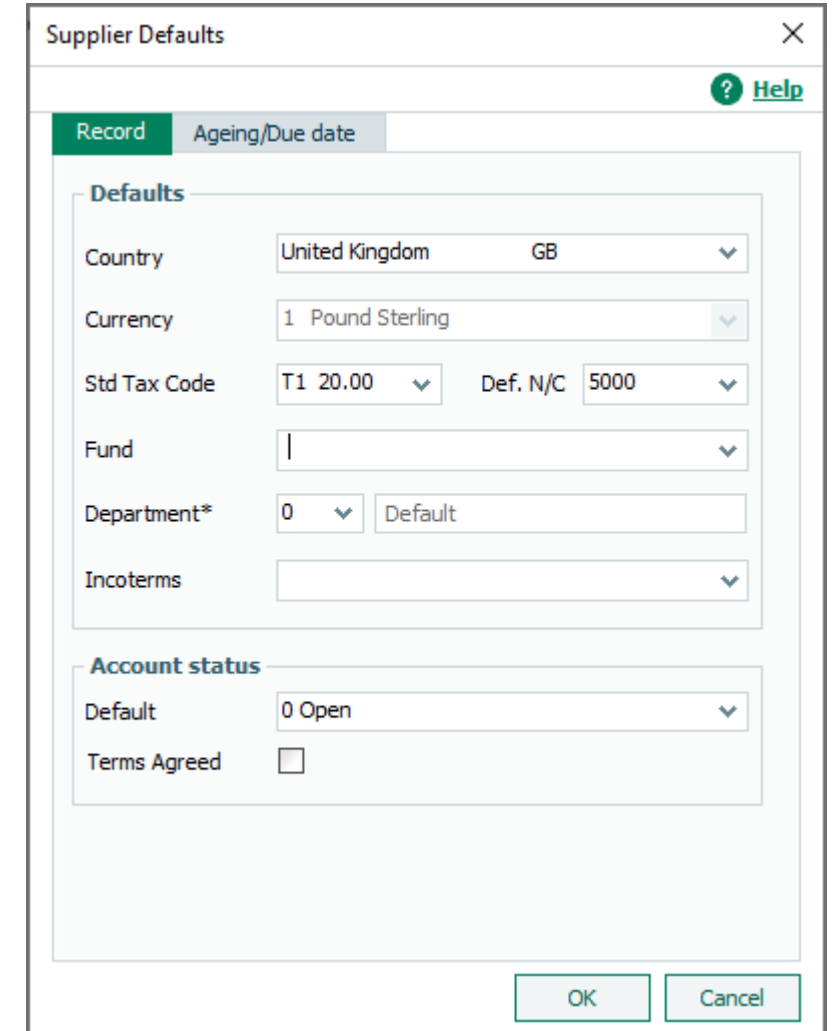
Terms Agreed

OK Cancel

Supplier Defaults

Settings > Supplier Defaults

- Record – Enter country, tax code, nominal, departments and discount.
- Ageing/due date – Specify how you want to age your supplier transactions.



The screenshot shows the 'Supplier Defaults' dialog box with two tabs: 'Record' (selected) and 'Ageing/Due date'. The 'Record' tab contains two sections: 'Defaults' and 'Account status'. The 'Defaults' section includes fields for Country (United Kingdom, GB), Currency (1 Pound Sterling), Std Tax Code (T1 20.00), Def. N/C (5000), Fund, Department* (0, Default), and Incoterms. The 'Account status' section includes a Default dropdown (0 Open) and a Terms Agreed checkbox. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

Bonus Tips

- Bank default tax codes
- Batch Changes Option
- Email and Custom fields
- Add/remove column headers
- How to hide options on the toolbar

Summary.

- Settings > Customer **or** Supplier defaults applies default posting details to new records.
- You can overwrite the defaults by going directly into the record and changing the defaults manually
- If you have batch changes option you can use this to change multiple records at once
- When creating a new transaction you can manually change the tax code and nominal code.
- Bank defaults for tax code pulls from the customer/supplier defaults.

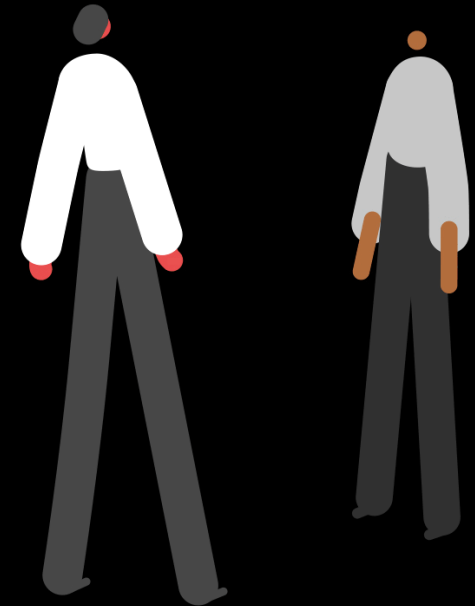
Extra Support

**Useful tips &
Resources**

**Time saving
tools**

**Regular tasks
50 Accounts**

Help Centre



Upcoming Webinars.



Upcoming Webinars.

Key Topics

Company Archives Wednesday 22 March 2pm

In this webinar you'll learn what a company archive is, how and when they're created, how to access and use one.

Year End Tuesday 4 April 2pm

This webinar explains the year end process from start to finish, including how to prepare for and run your year end and the optional post-year end tasks.

Upcoming

Running reports to reconcile VAT return

VAT return

Clear Audit Trail

Inactive records



Webinar Registration

What's included as a Sage member?



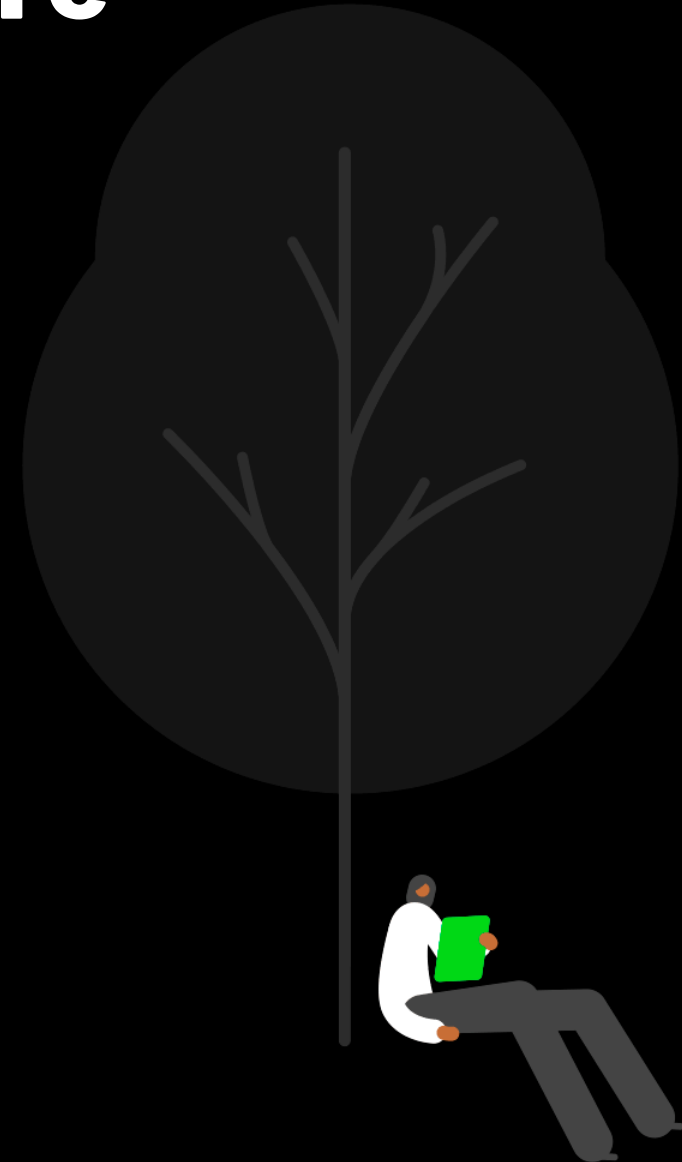
More than just great software

We know that running a business can be tough and at Sage we want to help you and your business with the many challenges you face.

That's why Sage goes beyond great software solutions

As a valued Sage customer and member of the Sage community, you'll enjoy benefits that help you and your business by connecting with brilliant experts and industry peers.

Sage is here to help you grow and your business flow.



A member of the Sage community

All included as a member of Sage – FREE

Being a Sage member you get **great software solutions**, expert advice to **get the most from your solutions** and **more help with the business challenges you face**. All wrapped in the **human touch of Sage's community** of customers, partners and colleagues.

Exclusive member benefits include:

Member
Masterclass

Learning

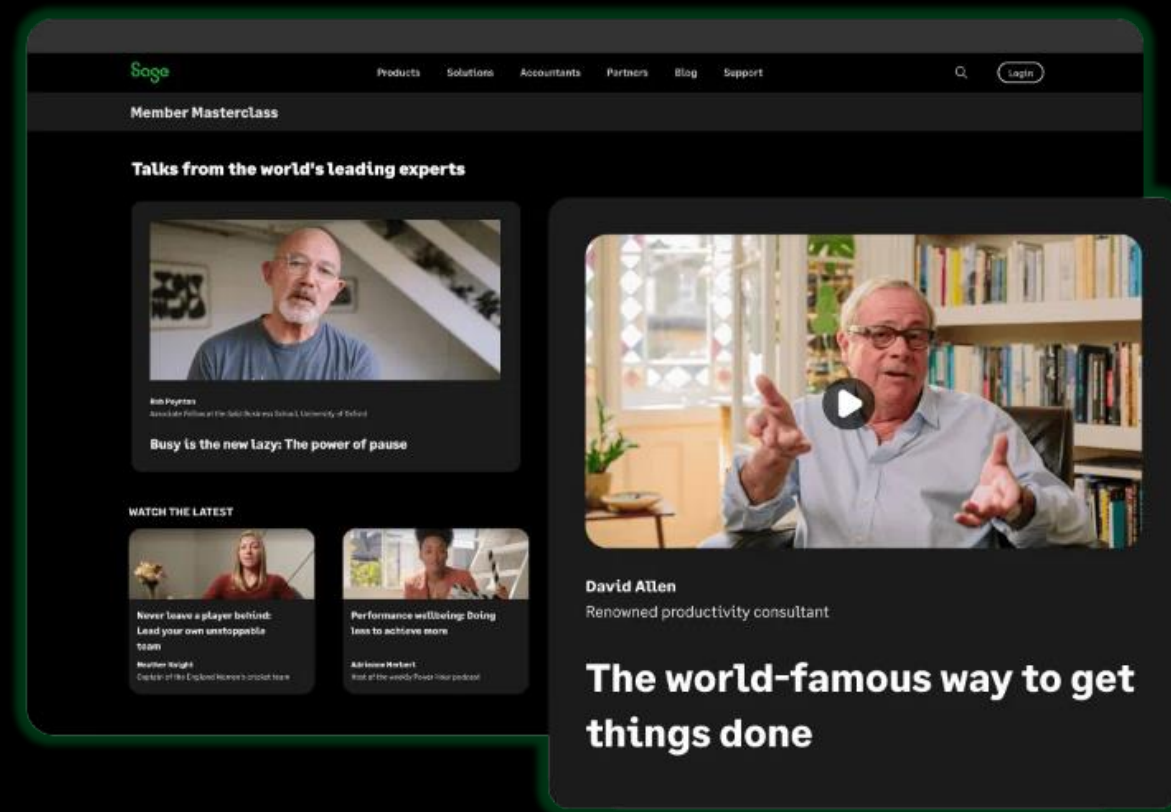
Community
Forums

Award winning
support

Business Advice

Software
Certification

Find out more about these [exclusive benefits](#).



Member Masterclass


As a Sage customer or partner you have automatic access to exclusive benefits, which includes expert human advice in Member Masterclass.

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