Customer & Supplier defaults.

Abby Picken

Housekeeping

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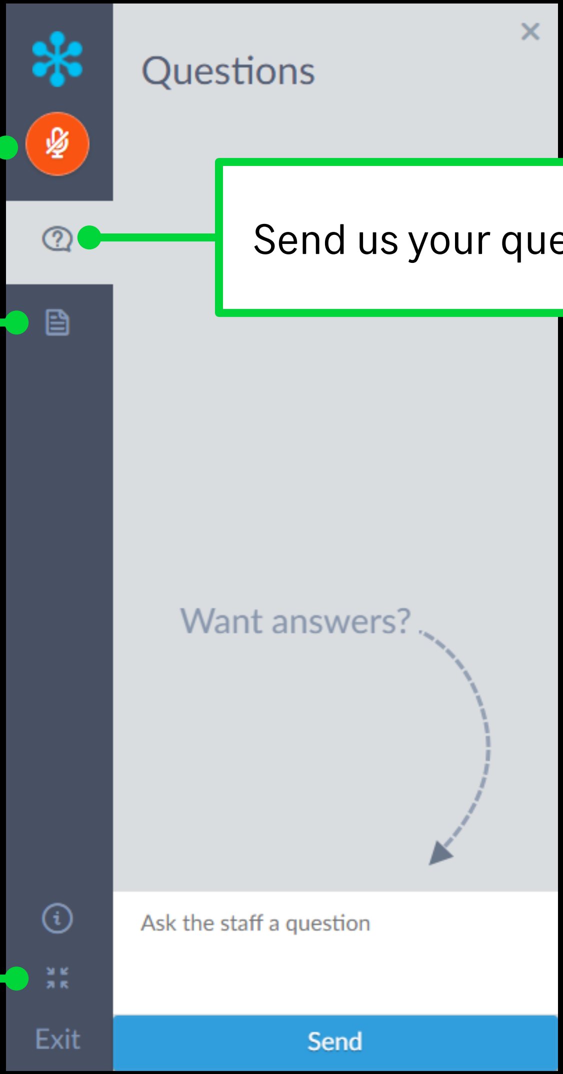

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Contents

Introduction & Benefits.

Introduction.

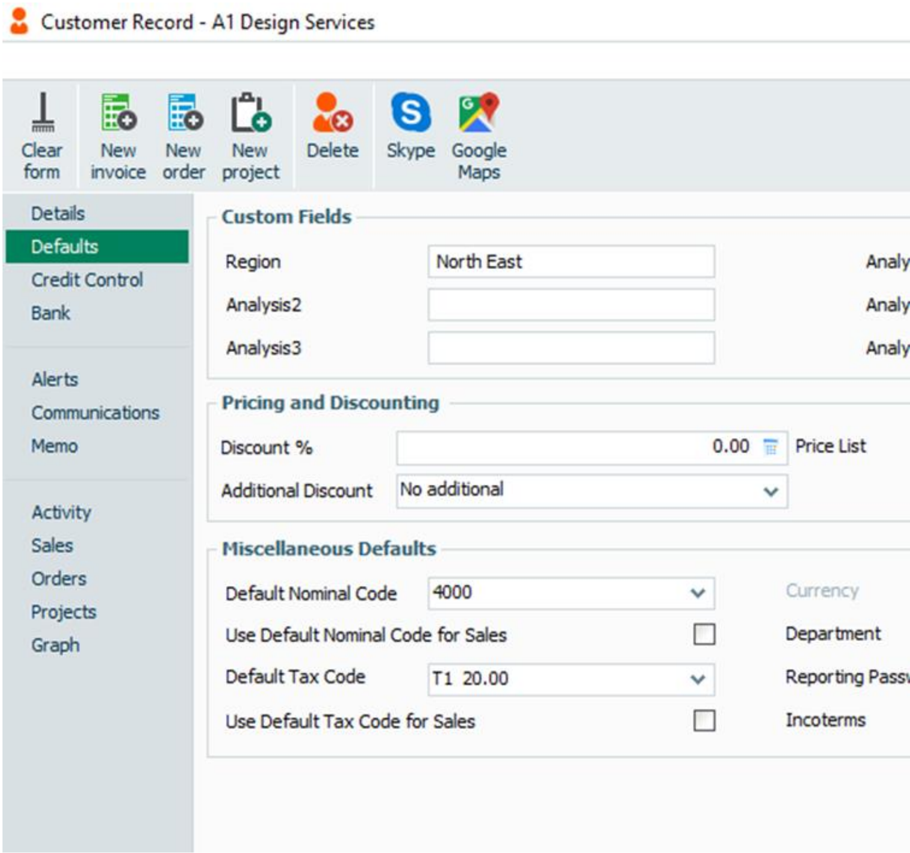
When you use customer and supplier records in Sage Accounts, some information and settings may apply every time a record is used.

There are two options in which you can apply defaults:

- Applying defaults within the customer or supplier record.
  - This can 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.



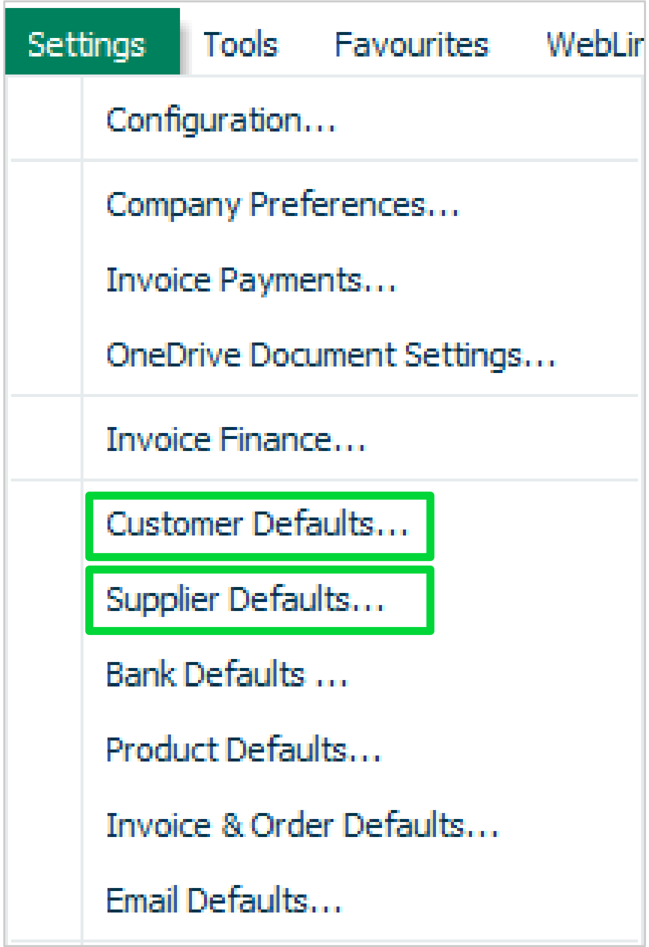
Benefits.

- 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

Customer Defaults

Supplier Defaults

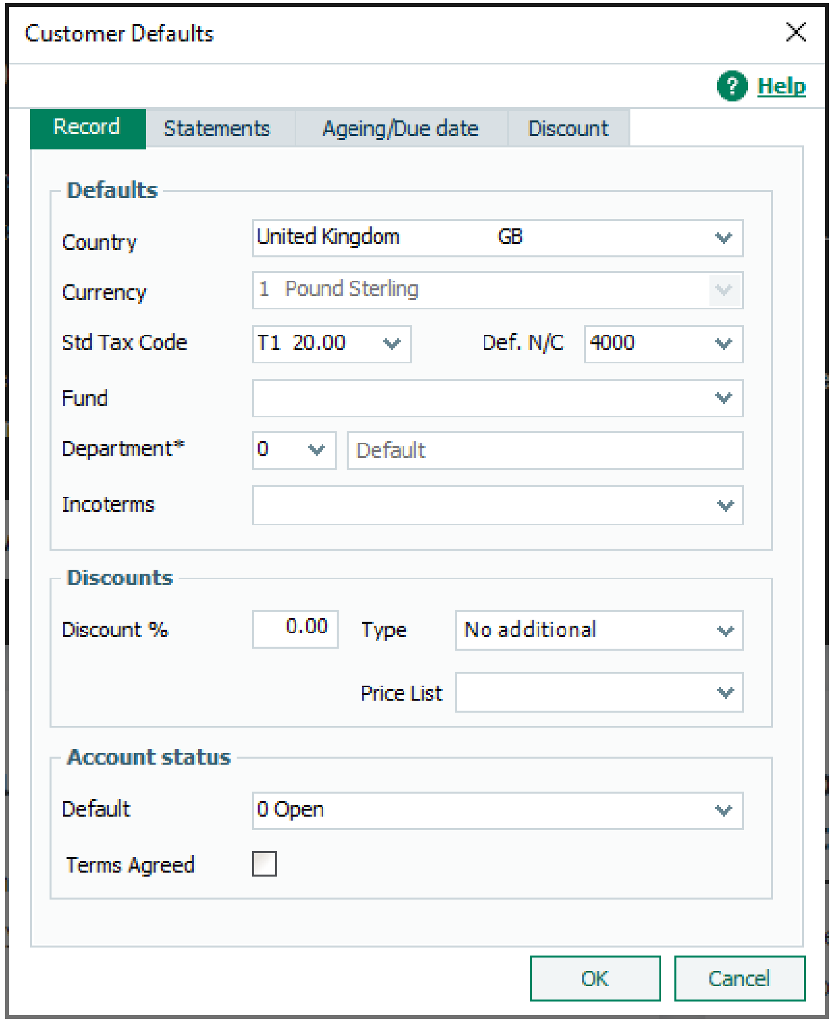


Defaults.

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



Nominal codes

Departments

Tax codes

Supplier Defaults

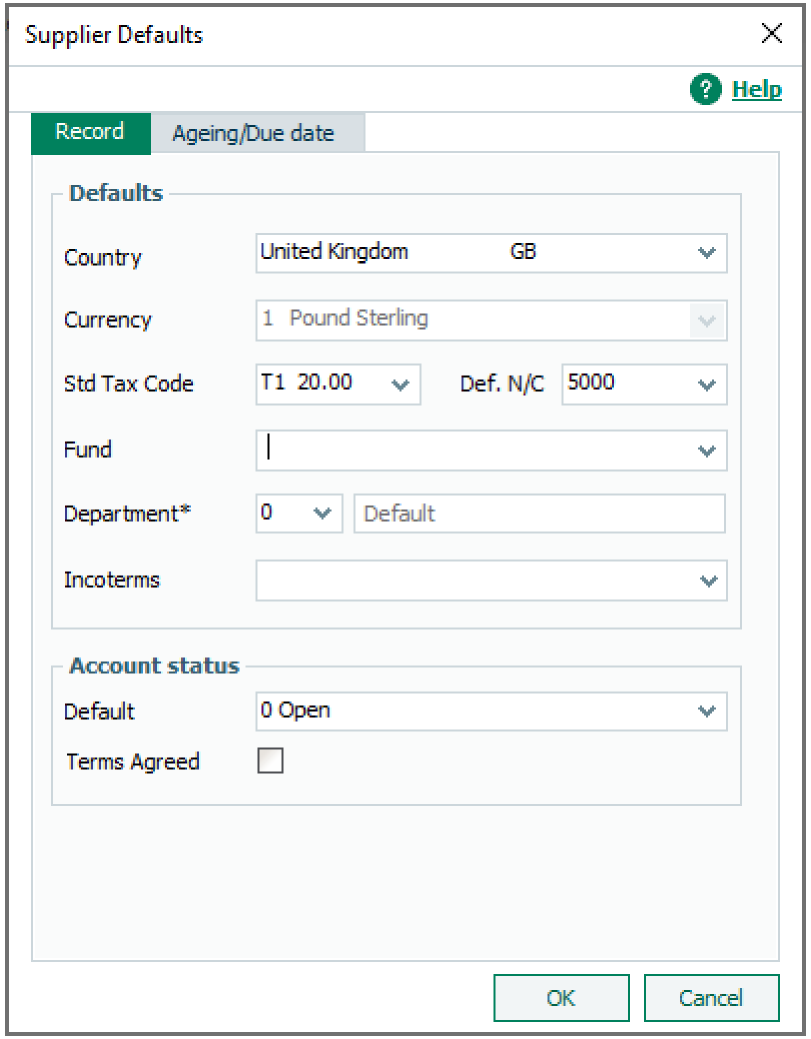
Settings > Supplier Defaults

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

Nominal codes

Departments

Tax codes



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.

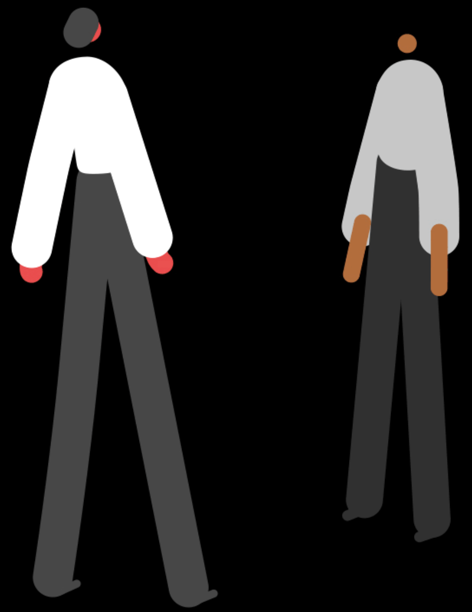
Extra Support

Useful tips & Resources

Time saving tools

Regular tasks 50 Accounts

Help Centre



Upcoming Webinars.

Upcoming Webinars.

Key Topics	Upcoming
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.	Running reports to reconcile VAT return VAT return Clear Audit Trail Inactive records
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.	**Webinar Registration**

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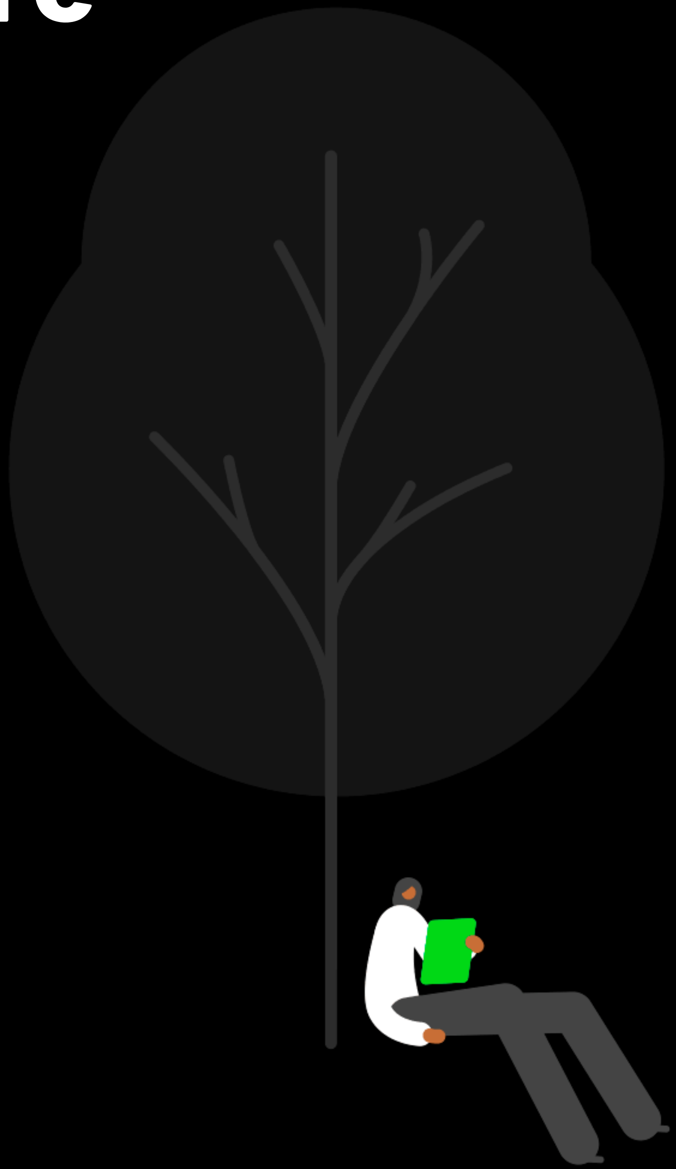

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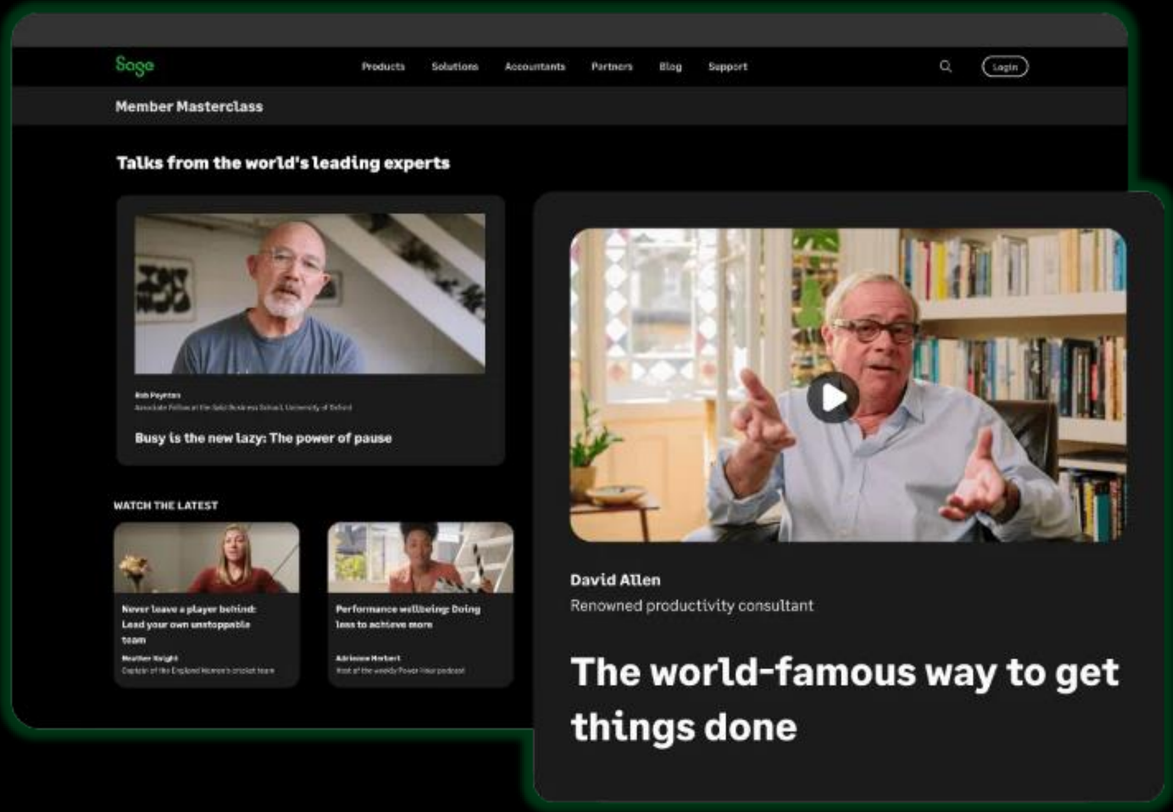
Award winning support	**Business Advice**	**Software Certification**



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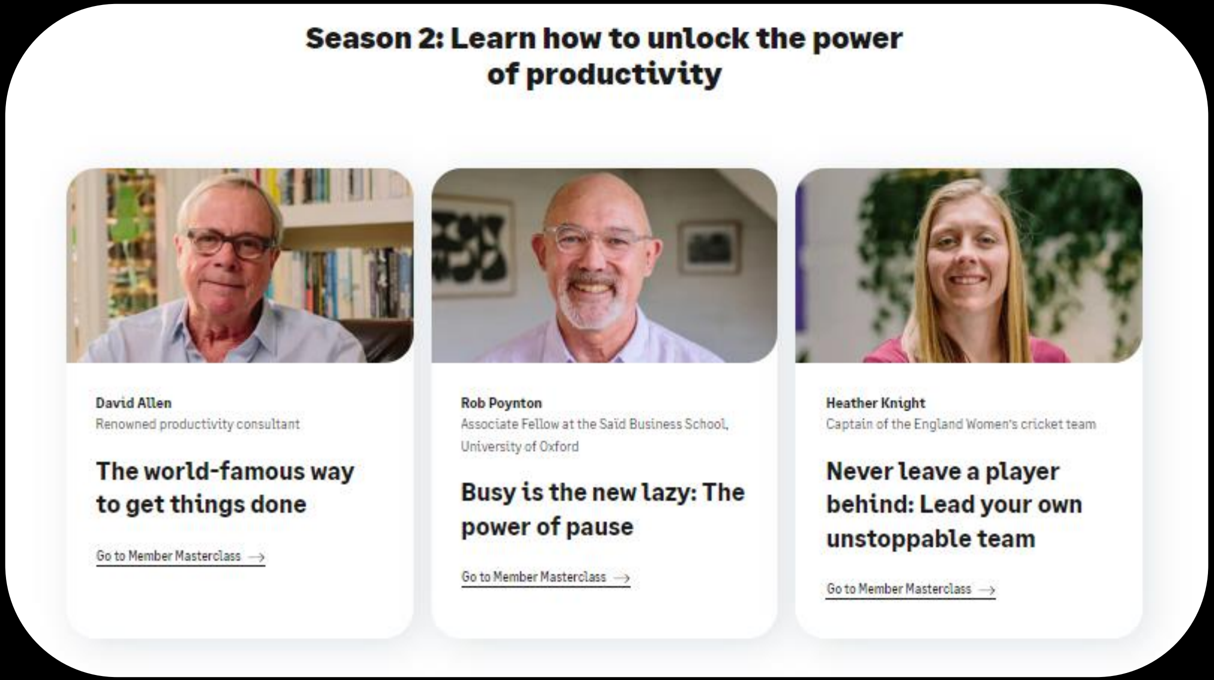
Each season includes a keynote talk, plus new talks published each week alongside short articles providing a range of insights, advice and inspiration. Talks are around 15 minutes long and bitesize articles are only a 5-minute read.



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