

Adding Custom Fields to the Customers/Prospects Window

Available in All Versions of Sage 50 Accounting

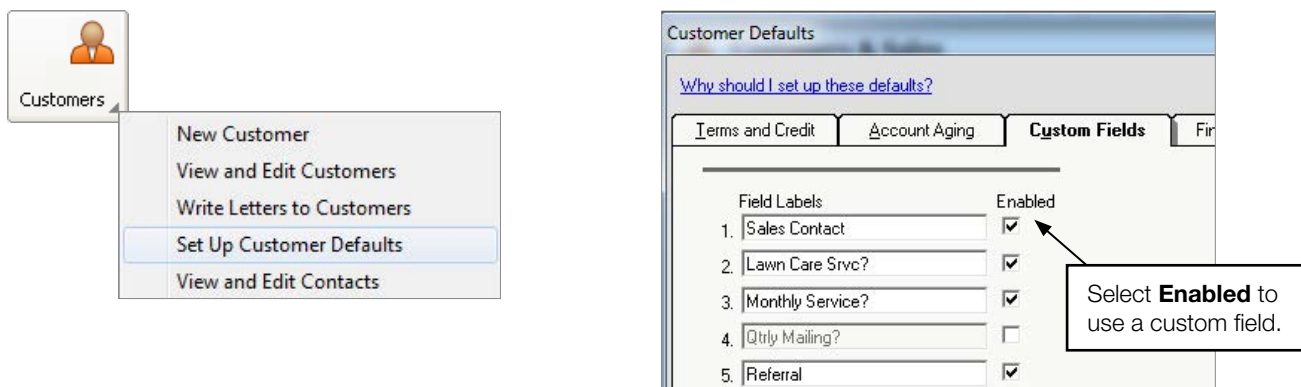
Quick Reference Guide

What are custom fields?

Fields that allow you to track additional information about your customers. Once these fields are set up, they will appear on the Maintain Customers/Prospects window.

How do I get there?

Customers & Sales Navigation Center > Customers > Set Up Customer Defaults > Custom Fields tab.



What are examples of custom fields?

- **Birthday**
Keep track of your customers' birthdays.
- **Personal Info**
Keep track of the names and ages of customers' spouses, kids, and pets to help initiate a personal conversation in future calls.
- **Mailing**
Indicate whether you send your newsletter or marketing materials to this customer.

Did you know?

You can add custom fields to the Customer Management Center, customer lists, reports, and forms. To add custom fields on the Customer Management tab, click Customize this page and add the Customer Information section. Click Customize on the Customer Information Section and add your custom fields. You can also use the custom fields as search criteria when looking for information on the Customer Management tab.

Customer ID: Find customer with: in

[Recent Selections](#)

Name: [Aldred Builders, Inc.](#) **Bill to contact:** Tony Aldred **Type:** LAND

Custom fields appear on the Customer Management tab.

Customer Information						
Customer Name	Telephone 1	Lawn Care Srvc?	Monthly Service?	Qtrly Mailing?	Referral	Contact
Aldred Builders, Inc.	770-555-0654	Yes	Yes	Yes	Internet	Tony Aldred

Modify Report - Aged Receivables

Dates
 Date:
 As of:

Sorting and Summary
 Sort by:
 Summarize report

Other Options
[Columns](#)
[Fonts](#)
[Page Setup](#)

Filters
[Select a filter:](#)
 Include Drop Shipments
 Ship To Name/Contact
 Sales Contact
 Lawn Care Srvc?
 Monthly Service?
 Qtrly Mailing?
 Referral

Select an option:
 All
 Range
 One or more

From: To:

No
 Yes

Select your custom fields as filters on your reports.

For more info, visit: Sage.com
 or contact us at 866-996-7243