

Adding Custom Fields to the Customers/Prospects Window

Available in all versions of Sage 50 Accounting

Quick Reference Guide

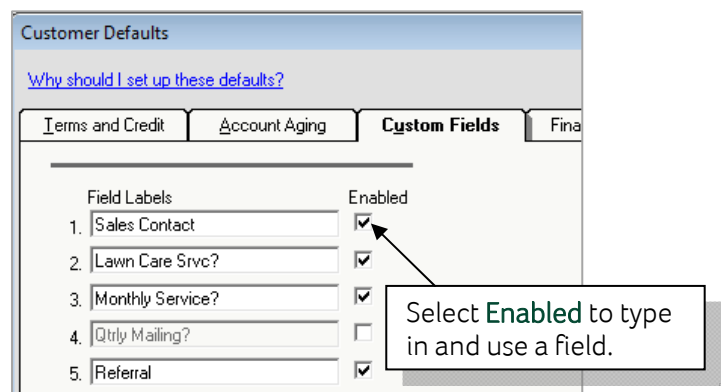
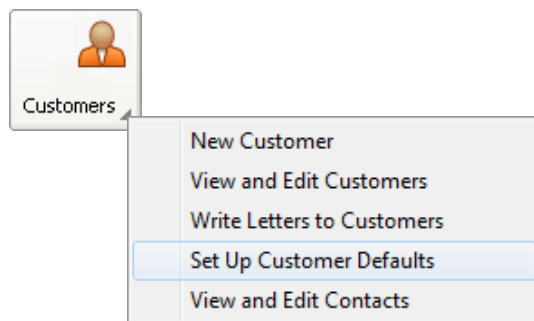


What are Custom Fields?

- 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, marketing materials, to this customer

Did you know?

- You can add custom fields to the Customer Management Center, customer lists, reports and forms.
- For example 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 **Phone:** 770-555-0654 **Bal**

Customer Information [Print](#) [Send To](#) [Customize](#)

Customer Name	Telephone 1	Lawn Care Srvc?	Qtrly Mailing?	Monthly Service?	Referral	Sales Co
Aldred Builders, Inc.	770-555-0654	Yes	Yes	Yes	Internet	Robert J.

Custom fields on the Customer Management tab

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 Accounts Receivable reports.