

Debtors Setup Functions

Debtors setup functions and debtors setup search functions are similar.

Some functions allow one to open up in the search, while others allow opening up in the debtors setup window

Edit Debtor

Debtors Details

Attachment Memo Create Reminder Debtor Enquiry View Attachments Functions Standard Alerts

Code : **ABC007** Debtor Name : **ABD Cor**

Details Address Contacts Account Details Gen Details Statute

Code: ABC007

Name: ABD Company

Trading As:

Short Name:

Commission: Otsile

Contacts: Tsile Loa

Company Registration No: 12345789/07

VAT No.: 47891236

Website: www.abd.co.za

Print Statement: ☒ Email Statement: ☒

Active: ☒ Is Head Office: ☒

Functions menu:

- Set Time Log Defaults
- Target
- Contract Setup
- Time Logging Budget
- Shipping Details
- Update Documents
- Create Sales Lead
- View Recurring Transactions
- View Linked S/N

Set Time Log defaults

Set the defaults for this customer for time logs

These defaults come from the CRM module - Contract Maintenance

Edit Debtor

Debtors Details

Attachment Memo Create Reminder Debtor Enquiry View Attachments Functions Standard Alerts Close

Code: **ABC007** Debtor Name: **ABD Company** Outstanding Balance: **312,251.45**

Address Contacts Account Details Gen Details Statutory Info Custom Fields Activity **Time Logging**

Charge Travel Fees: ☒ Charge Toll Fees: ☐ Contract:

Travel Bill Type: ☒ Distance ☐ Time Task:

Distance Rate: Billing Rate:

Travel Item: Potential Billing Rate:

Toll Fees Item: Service Item:

Toll Value: Time Rate:

Non Billable: ☐

GPS Longitude:

overwrite Data? Are you sure you would like to overwrite the existing time logging data? Yes No

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#	Employee	Contract Setup	Task	Billing Rate	Service Item
1	Imraan Saljee	General Contract	Administration	Non Charge	Labour General

Displaying 1 - 1 of 1

Sets the customer to the defaults under Contract maintenance

CRM

Configuration

- Check List Template Setup
- Check List Groups
- Check List Questions
- Interaction Types
- Website Support Groups
- Website Support Forms
- Support Log Ticket Setup
- Contract Maintenance**
- Time Tracker Config
- Expense Setup
- Sales Lead Setup

Contract Search

Search Add Edit Delete Clone Contract Import / Export

Code: Description: Archived: ☐

Billing Rate Contract Task **Defaults**

Charge Travel Fees: ☒ Charge Toll Fees: ☐ Contract:

Travel Bill Type: ☒ Distance ☐ Time Task:

Distance Rate: Billing Rate:

Service Item: Potential Billing Rate:

Travel Item: Time Rate:

Toll Fees Item: Time Travelled:

Toll Value: Distance To:

Save Defaults

Target

See more information on Target in this section - [Target information manual](#)

Contract Setup

See more information on Contract Setup in this section - [Contract Setup information manual](#)

Revision #6

Created 4 October 2024 21:54:11 by Malcolm

Updated 17 December 2024 02:21:32 by Pamela