

# Head Office and Branch Customers

It is possible to set up a customer as a head office and attach branches to it therefore invoices that are done for each branch are allocated to the head office account. In effect the only real difference is that the invoice name and address of the branch appears on the invoice, everything else; credits, receipts and refunds go to the head office. All invoices will appear on the head office customer statements.

## How To Set It Up

Choose the customer who is to be the head office

In Phone/Address – Customer Details tick the **Make This A Head Office** checkbox. Scroll down to the customer you want to attach as a branch.

All the Head office customers will appear in the Head Office list. Position the bar on the head office you want to attach this customer to and press the small down arrow button to allocate.

**Astarla Consulting Pty Ltd**

THEMECH [Goto Top] [Goto Bottom] [Browse] [Dial] [View Open Jobs Only] [Close]

Code	Name	Contact
THEAGE	The Age (Melbourne Newspaper)	
THEMECH	The Mechanic	Brett/Charleen
THEMONOG	The Monogram Man	
THEPERS	The Personal Trading Post	
TIGERLIL	Tigerlilly Cafe Chevron	

**Customer Details**

Credit Limit: 0.00  No Gst  
Discount: 0.00  
Sales Rep: SAM  
Territory: [Dropdown]  
Price Category: RETAIL  
Payment Terms: Monthly  
Grade: Five Star  
Discount Matrix Code: [Dropdown]  
Preferred Stock Location: [Dropdown] X  
Delivery Run: Gold Coast Run

Stop Credit  
 Make This a Head Office  
 Cash Sale Customer  
 Courtesy Customer  
 Credit Card Customer  
 Balance Forward Statements  
 Bad Debtor About To Write Off  
 Backorders In Invoicing  
 Email Statement  
 Email Invoice Automatically

Trading Discount  
 Prompt Pay Discount

Change Customer Code  
Sales Info  
Transactions  
Receipts

**Attach To Head Office**

X [TDM] [Dropdown]

General Ledger Sales Account  
X [ ] [Dropdown]

Labour Code (Timesheets)  
X [ ] [Dropdown]

**Head Office List**

Code	Name
TDM	Transport Diesel & Marine

Edit P/P Discounts  
 Don't Refresh  
 Archive