

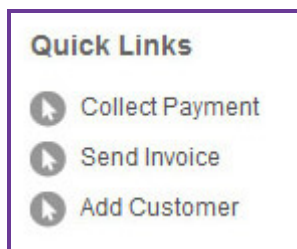
How to Enter Customers

You can add an unlimited number of customers in your PaySimple account. Once you add customers, you can easily send them invoices, collect payments from them, set-up recurring invoice and recurring payment schedules, and view a complete history of invoices sent and payments made. You can also collect payments from customers online or over the phone, and can store payment account information for easy repeat transactions.

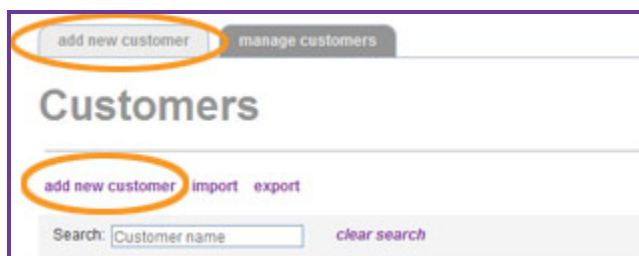
Adding customers to PaySimple is simple. Follow the step-by-step instructions below.

Customers are added to PaySimple from the **Add New Customer** screen. This screen can be accessed in three ways:

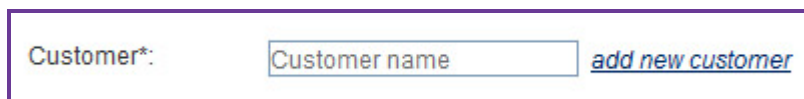
1. Clicking the **"Add Customer"** Quick Link in side navigation.



2. From the **Customers** center. Click the "Manage Customers" button in side navigation. Then click the "add new customer" link at the top of the **Manage Customers** screen or click the **add new customer** tab.



3. From the **Send new invoice** or the **Collect new payment** screen. Click the "add new customer" link that appears next to the **Customer** search box.
TIP: Clicking the link will open the **Add New Customer** screen. When you've saved the customer, the system will return you to the screen you were on with the customer you just added active.



To add a new customer to PaySimple, follow these steps:

1. Click any "add new customer" button or link.
2. The **Add New Customer** screen opens with all fields blank.

3. The top portion of the form is used for customer contact information and custom fields.

Customers

Add or edit customer details here. You can also securely store your customer's credit card and bank account information for future use.

<p>First name*: <input style="width: 100%;" type="text"/></p> <p>Last name*: <input style="width: 100%;" type="text"/></p> <p>Phone: <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/></p> <p>Email: <input style="width: 100%;" type="text"/></p> <p>Website: <input style="width: 100%;" type="text"/></p> <p>Email List: <input type="checkbox"/></p>	<p>Company: <input style="width: 100%;" type="text"/></p> <p>Account #: <input style="width: 100%;" type="text"/></p> <p>Alt phone: <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/> <input style="width: 25%;" type="text"/></p> <p>Alt email: <input style="width: 100%;" type="text"/></p>
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- **First name:** Enter your customer's first name. (Required, 25 character maximum)
- **Last name:** Enter your customer's last name. (Required, 25 character maximum)
- **Company:** If this is a business customer, enter the name of the business in the field. For a consumer, leave this field blank. (30 character maximum)
TIP: You can use Company name when searching for a customer in any PaySimple search field.
- **Account #:** If you have an internal account number assigned to this customer, enter it in this field.
- **Phone:** Enter your customer's primary 10-digit phone number, area code first.
- **Alt phone:** Enter an alternate 10-digit phone number, area code first. Extensions are not supported.
- **E-Mail:** Enter a valid email address for the customer. While this field is not required, you will not be able to create an invoice or invoice schedule for any customer without an email address.
TIP: If you attempt to enter an invoice or invoice schedule for a customer without a saved Email address, the system will prompt you to enter one.
- **Alt email:** Use this field to store an additional email address for your customer.
- **Website:** Your customer's website address.
- **Custom Fields:** In the above example "Email List" is a custom checkbox field. Any custom fields you enter for the Customer Record will be displayed vertically at the bottom of the right-hand column.
TIP: To learn more about custom fields, see Configuration Settings in Chapter 8 of the PaySimple User Guide.

4. Completing all fields (except **Address 2**) in the **Billing Address** section is required. PaySimple accepts U.S. state, territory and military addresses and Canadian addresses. "USA" is the default setting for the **Country** field which populates the **State/Province** field with U.S. postal abbreviations. Select "Canada" in the **Country** field to populate the **State/Province** field with Canadian Province postal abbreviations from which to select. When entering Canadian postal codes do not include spaces or dashes.
TIP: The standard entry for the Zip/Postal Code field is a 5-digit zip code for U.S. addresses. You can use a 9-digit (Zip-4) zip code by entering all 9 digits in a single string, i.e. xxxxxxxx. This is the way the zip code will appear on invoices and receipts. PaySimple does not support the Zip-4 format of xxxxx-xxxx.

Billing address	Shipping information <input checked="" type="checkbox"/> Same as billing
Address 1*:	<input type="text"/>
Address 2:	<input type="text"/>
City*:	<input type="text"/>
State/Province*:	-- select --
Country*:	USA
ZIP/Postal Code*:	<input type="text"/> Help

5. Entering **Shipping Information** for the customer is optional. .

Billing address	Shipping information <input type="checkbox"/> Same as billing
Address 1*:	123 Any St.
Address 2:	<input type="text"/>
City*:	Denver
State/Province*:	CO
Country*:	USA
ZIP/Postal Code*:	80202 Help
	First name: <input type="text"/>
	Last name: <input type="text"/>
	Phone: <input type="text"/> <input type="text"/> <input type="text"/>
	Alt phone: <input type="text"/> <input type="text"/> <input type="text"/>
	Email: <input type="text"/>
	Alt email: <input type="text"/>
	Address 1: <input type="text"/>
	Address 2: <input type="text"/>
	City: <input type="text"/>
	State/Province: -- select --
	Country: USA
	ZIP/Postal Code: <input type="text"/> Help

- You can check leave the **Same as billing** box checked to copy the billing address values into the corresponding **Shipping information** fields.
TIP: Updates to billing address will be saved to **Shipping information** as long as the **Same as billing** box is checked when they are made.
- To leave all **Shipping information** fields blank, uncheck the **Same as billing** box to reveal the shipping fields. Leave them all blank and save the form.
- To enter unique Shipping information, uncheck the **Same as billing** box to reveal the shipping fields. Enter values as required.

6. The **Notes** text area is an open field in which you can enter any information about the customer you would like to store. For example, you might enter information about spouses or children, the time of day best to reach the customer, special requests, etc.

Notes :	<input type="text"/>
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7. Store one or more **Credit card accounts** in the system for this customer. All stored credit card accounts will be available to use when you enter a payment or payment schedule in PaySimple, or when your customer logs-in to make a payment.

TIP: If your PaySimple account is not configured for credit card transactions, you will not see this section. Storing credit cards on this screen is optional. You can always enter new credit cards when entering a new payment or payment schedule.

- a. When you are entering a customer for the first time, the **Credit card accounts** section is displayed in new-card-entry mode, as shown below. To add a new credit card:

- i. Enter credit card information: Select the **Card type** from the drop-down box, enter the account number in the **Card number** field and select the month and year for the **Expiration date**. (Supported card types include American Express, Visa, MasterCard and Discover, though your account may not be enabled for all of these options.) As this is a new customer, whether or not the **Set as default account** checkbox is checked, the credit card you enter will be saved as the default account.
TIP: When you add additional credit cards you will be able to choose the one assigned as the default.
 - ii. Click the “save credit card” button to add the card. You can also click the “cancel” button to clear all fields without saving.
- b. The system encrypts and securely stores the credit card number. You will now see it listed as an available card in the system, as shown below:

Card number	Expiration date	Card type	Default		
*****5454	12/10	Master	✓	edit	delete

TIP: If you make a mistake when entering the card, just click the “edit” link to correct the **Expiration date** or **Card type**, or the “delete” link to delete the card entirely.

- c. To add additional credit cards, click the “add new account” link, and fields for adding a new credit card will appear below the link.
 - Enter the new card as described in *Step a* above. If you want to cancel the new card entry without saving it, click the “cancel” link to close the section without saving the card. There is no limit to the number of credit cards that can be saved with the Customer Record.

TIP: If you want to set the new card as the default credit card, check the **Set as default account** box when entering account information.

TIP: You must click the “save credit card” button each time you enter a new account in order to encrypt and save it. You need to do this in addition to clicking the “save changes” button at the bottom of the screen.

8. Store one or more **Echeck (ACH) bank accounts** in the system for this customer. All stored bank accounts will be available to use when you enter a payment or payment schedule in PaySimple, or when your customer logs-in to make a payment.

TIP: If your PaySimple system is not configured for Echeck (ACH) transactions, you will not see this section. Storing bank accounts on this screen is optional. You can always enter new bank accounts when entering a new payment or payment schedule.

- a. When you are entering a customer for the first time, the **Echeck (ACH) accounts** section is displayed in new-account entry mode, as shown below. To add a new bank account:

- i. Enter the name of the bank in the **Bank name** field.
- ii. Enter the **Bank routing number**-- the routing number is the 9-digit number that identifies the bank.
TIP: When you save the bank account, the system will do a routing number validation check to make certain that the number you entered is a valid bank routing number.
- iii. Enter the **Bank account number**.
- iv. In the **Account type** drop-down list, select “Checking” for a checking account, or “Savings” for a savings account.
- v. As this is the first bank account you are entering, it will be set as the default bank account whether or not the **Set as default account** box is checked.
TIP: When you add additional bank accounts you can choose the one assigned as the default.
- vi. Click the “save bank account” button to save the new bank account.

- b. The system encrypts and securely stores the bank account number, and you now see it listed as an available account in the system, as shown below:

Echeck (ACH) accounts (optional)			
Bank account number	Bank routing number	Bank name	Default
*****6666	072000326	Test Bank	✓ edit delete
+ add new account			

TIP: If you make a mistake when entering the bank account, just click the “edit” link to correct the **Bank routing number** or **Bank name**, or click the “delete” link to delete the account.

- c. To add additional bank accounts click the “add new account” link, and fields for adding a bank account will appear below the link.

- Enter the new account as described in *Step a* above. If you want to cancel the new account entry without saving it, click the “cancel” link to close the section without saving the account. There is no limit to the number of bank accounts that can be saved with the Customer Record.

TIP: If you want to set the new bank account as the default account, check the **Set as default account** box when entering account information.

TIP: You must click the “save bank account” button each time you enter a new account in order to encrypt and save it. You need to do this in addition to clicking the “save changes” button at the bottom of the screen.

9. When you are finished entering information on the **Add New Customer** screen, scroll all the way to the bottom of the screen and click the **save changes** button. To discard the customer without saving it, click the **cancel** button, or click the “back to customer list” link.

Reminder: To save a new card or echeck account, click the save buttons located above before clicking “save changes” below.

cancel

[< back to customer list |](#)
save changes

When the customer is successfully saved, you’ll be returned to the main **Manage Customers** screen, or to the page you were on when you clicked the “add new customer” link.