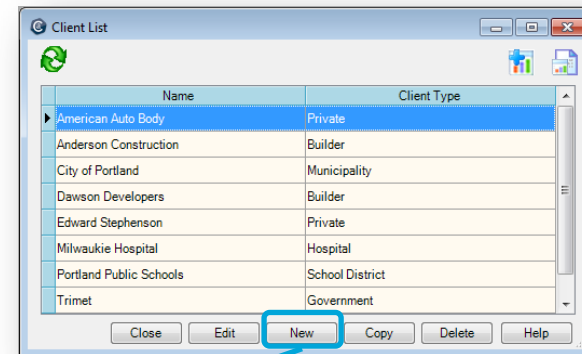


# Setting up clients

**Goal:** Set up information you will need for each client as you work with Ajera.

1. Click **Setup > Clients**.
2. Click the **New** button.
3. On the **General** tab, begin entering information about the client.



Enter the name of the client.  
It appears on client invoices, statements, and reports.

Select the client type.  
Client types are used to group similar types of clients together for reporting.

Enter the date you started doing business with the client.

Enter the various contact information for the client.

Client - City of Portland

Status: Active

General | Address | Contacts | Attachments | Notes

Name: City of Portland

Client type: Municipality

Date established: [ ]

Annual percentage rate: 18.00 %

Prepayment beginning balance: 0.00

Send statement:

Create finance charges:

Phone Numbers:

503-520-5655	Office
503-966-9685	Emergency cell phone
Fax: 503-520-5657	Office fax

Email: admin@cityofportland.org

Website: www.portlandonline.com

Buttons: Close, Save, Cancel, Help

- Continue entering information about the client on the **General** tab.

The screenshot shows the 'Client - City of Portland' form with the following fields and callouts:

- Status:** Active
- General tab:** Name: City of Portland; Client type: Municipality; Date established: [empty]
- Callout 1:** Leave the Send Statement check box selected if you want to automatically include this client when printing statements. Otherwise, clear it.
- Callout 2:** This field appears until you finish working with your beginning balances. Enter or change the amount of prepayments for this client, if necessary.
- Callout 3:** If you set up finance charges on the Company > Preferences > Billing tab, this check box appears. To use a different percentage rate for this client from the one you set up, enter it in the Annual Percentage Rate field. If you do not want to create finance charges on any of this client's outstanding balances, clear this check box. Otherwise, you are able to create finance charges for this client by using the Manage > Finance Charges menu.

Fields shown in the screenshot include:  Send statement;  Create finance charges; Annual percentage rate: 18.00 %; Prepayment beginning balance: 0.00.

5. Click the other tabs to enter the remaining information for the client.

Click the Address tab to enter the client's address.

Click the Contacts tab to enter information for the people you contact at the client's company.

Click the Attachments tab to add any links to files or websites that you want to reference regarding this client.

The screenshots show the following data:

- Address Tab:** Address: 555 SW Capitol Hwy; City: Portland; State: OR; Zip: 97202; Country: USA.
- Contacts Tab:** Three contacts listed: City of Portland, Stan Meinkin (Contact for all questions on active jobs); City of Portland, Linne Johnson (Contact for all billing and receivables questions); City of Portland, Thomas Martin.
- Attachments Tab:** A table with columns: Category, Description, Added.

**Summary**  
In this lesson, you learned how to set up clients so you can easily work with client information as you need it.