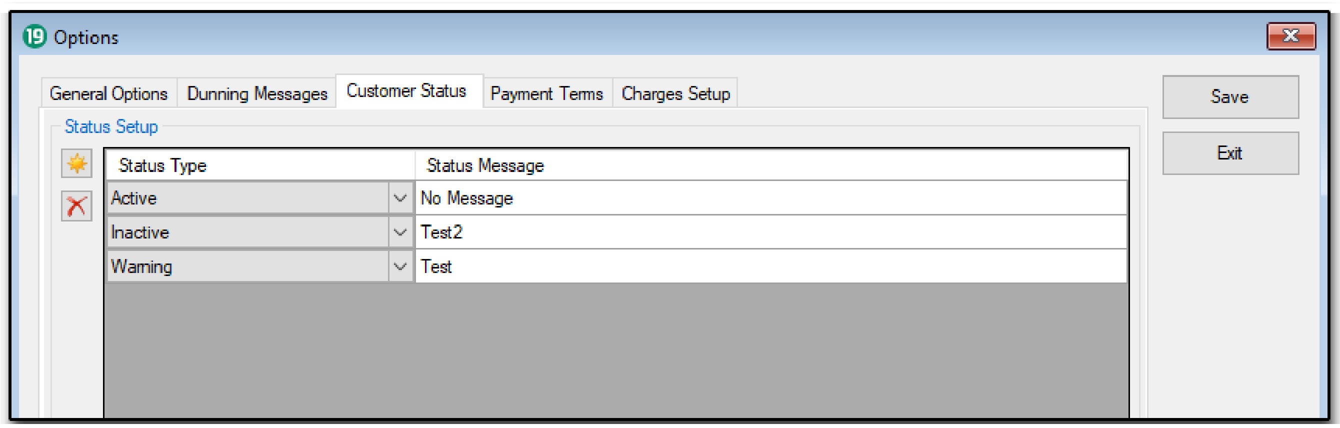
Customer Status Tab (2019)

This article is for Drake Accounting 2019. To view this article for Drake Accounting 2018, click here.

Designate a customer status and corresponding message to appear in the **Status** field on the **Receivables > Invoices** screen when a customer is selected from the **Customer** drop list. When a customer has a status of **Active**, no message displays. This message does not print on customer statements or invoices.



To associate status messages with customer statuses:

1. Go to **Receivables > Options > Customer Status tab**.
2. Click the  to create a new status. Click the  to delete it.
3. On the left, select a status of **Warning**, **Hold**, **Inactive**, or **Notify** from the Status drop list.
4. On the right, enter a Status Message (max. 100 characters) in the **Status Message**.
5. Repeat process for all needed status messages.
6. Click **Save**.
7. Assign a status to a customer by going to **Receivables > Customer Setup**.

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