

# Creating and managing customers

## Selling and customers

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# Creating and managing customers

Add customers once, group them, and set their payment terms and contacts.

Beginner · About 12 minutes · Version 1.0 · Updated 17 November 2026

**Plan availability**

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

## Overview

A **Customer** record stores everything about a customer that you reuse on every sale: their name, tax ID, address, contacts, payment terms and credit limit. Create each customer once, and select it on quotations, orders and invoices.

## Steps

1. Search for **New Customer**.
2. Enter the **Customer Name**. Use the legal or common trading name, consistently.
3. Choose the **Customer Type**: *Company* or *Individual*.
4. Choose the **Customer Group** (for example *Commercial* or *Individual*) and **Territory** (for example *Kenya*). These are used to group sales in reports.
5. Enter the **Tax ID** (KRA PIN) if the customer has one, so it prints on invoices.
6. Save the customer. The **Connections** panel then lets you add an **Address** and a **Contact** with phone and email.
7. In the **Accounting** tab, set the **Payment Terms** (for example *30 days*) and a **Credit Limit** if you want a warning when a customer owes too much.

## Practical example

Baraka Supplies is created as a *Company* in the *Commercial* group, territory *Kenya*, with the KRA PIN and the Nakuru address, and payment terms of 30 days. Every invoice for them then picks up the PIN and the due date automatically.

## Important notes

- To see everything about a customer, open their record and use the **Connections** tab, or open the **Accounts Receivable** and **Customer Ledger Summary** reports.
- Search before you create. A second record for the same customer splits their history in two.

- You can merge a duplicate customer into another from the **…** menu, then **Rename**.

## Common mistakes

- Typing the customer name differently each time, creating duplicates.
- Leaving the address empty, so invoices print without one.

## Next steps

Read Leads and opportunities.

## Related documentation

- From quotation to payment
- Creating a sales invoice
- Leads and opportunities