



At the Customer Name/#: prompt you can enter the customer's name (last name first), account number, address, driver's license number, phone number or social security number via function keys:

**F1-ADDRESS** - Note: You may search by partial numeric address

**F2-DRIVERS LICENSE NUMBER**

**F3-SOCIAL SECURITY NUMBER**

**F4-ACCOUNT NUMBER**

**F5-HELP SCREEN**

**F6-PHONE NUMBER** - Note: Type in the entire phone number.

### ***Listing available customers (alphabetically)***

At the Customer Name/#: prompt you can enter the customer's name (last name first; full or partial) and press the ENTER key. At the next prompt, you can enter part of their first name or press the ENTER key again and you will get a listing of customers in alphabetical order, see Figure 9-3.

| Customer Maintenance   |            |            |                  |                |             | 12/20/04 |
|--|------------|------------|------------------|----------------|-------------|----------|
| Customer Name/#: MCCANN  |            |            |                  |                |             |          |
| Acct Nbr   | Last Name  | First Name | Address          | DL# Or City    | S S A N     |          |
| * 511834   | MCCANN     | KATHERINE  | 1032 E KNAPP ST  | ANYTOWN        | 000-00-0001 |          |
| 501794   | MCCANN     | MARY       | 1004 SILENT SUND | ANYTOWN        | 000-00-0001 |          |
| 507365   | MCCANN     | MARY       | 14046 N HIGHLAND | ANYTOWN        | 000-00-0001 |          |
| * 505608   | MCCANN     | SUSAN      | 119 BIRCH RD.    | ANYTOWN        | 000-00-0001 |          |
| 510143   | MCCARTHY   | CATHY      | 1905 N 2ND DRIVE | ANYTOWN        | 000-00-0001 |          |
| * 500414   | MCCARTHY   | PAM        | 30828 KETTERHAGE | ANYTOWN        | 000-00-0001 |          |
| 506603   | MCCARTHY   | SCOTT      | 172 N ELMWOOD    | ANYTOWN        | 000-00-0001 |          |
| * 505961   | MCCARTY    | APRIL      | 13575 WRAYBURN R | ANYTOWN        | 000-00-0001 |          |
| 502808   | MCCAW      | KATHY      | 1471 PARTRIDGE H | ANYTOWN        | 000-00-0001 |          |
| * 503697   | MCCLAIN    | DAISY      | 4108 N 41ST ST   | ANYTOWN        | 000-00-0001 |          |
| 506503   | MCCLAIN    | DEB        | 3673 T-BIRB WAY  | ANYTOWN        | 000-00-0001 |          |
| 504528   | MCCLINTOCK | PAMELA     | W210N11190 MOUNT | M2456716578905 | 000-00-0001 |          |
| * 510588   | MCCLINTOCK | TOM        | 1329 CROWLEY AVE | ANYTOWN        | 000-00-0001 |          |
| 502422   | MCCLONE    | LYNN       | W169 N4961 HERIT | ANYTOWN        | 000-00-0001 |          |
| * 509002   | MCCLOSKEY  | KATHERINE  | 825 THOMAS DR    | ANYTOWN        | 000-00-0001 |          |
| F1-Next Page   F2-Prev Page   F3-AR/RTO Hist   F4-Chg   F5-Delete   F6-Add |            |            |                  |                |             |          |

**Figure 9-3 Customer Maintenance Screen (customers alphabetically)**

Screen Prompts at the bottom of the screen are as follows:

**F1**-Will take you to the next page of this search.

**F2**-Will take you back a page in this search.

**F3**-Will show you the AR/RTO, ticket history on the customer you have highlighted.

**F4**-Will allow you to make changes to the address, etc. on the customer you have highlighted.

**F5**-Will allow you to delete the customer you have highlighted. **NOTE:** this is only possible with proper security and only if this customer has no ticket history.

**F6**-Will allow you to add a customer.

**Listing available customers (by address)**

If you wanted to look up a customer by address, enter all or part of the address and press the F1 key. In the following example, 1526 was entered at the Customer/# prompt and F1 was pressed. See Figure 9-4.

| Customer Maintenance   |              |            |                  |             |             | 12/20/04 |
|--|--------------|------------|------------------|-------------|-------------|----------|
| Customer Name/#: 1526  |              |            |                  |             |             |          |
| Acct Nbr   | Last Name    | First Name | Address          | DL# Or City | S S A N     |          |
| ■ 503250   | MORRISON     | TERESA A   | 1526 GRANDVIEW A | ANYTOWN     | 000-00-0001 |          |
| * 507643   | MANTEL       | ARLEEN     | 1526 MOONLIT CT  | ANYTOWN     | 000-00-0001 |          |
| * 511546   | DANNER-SUSTA | JANE       | 1526 N 50TH ST   | ANYTOWN     | 000-00-0001 |          |
| 507705   | WADDICH      | CHRISTIAN  | 1526 N JACKSON S | ANYTOWN     | 000-00-0001 |          |
| * 503265   | WENZLER      | AMY        | 1526 RIDGE CT    | ANYTOWN     | 000-00-0001 |          |
| * 506403   | GALL         | DAWN       | 1527 GALAXY CT   | ANYTOWN     | 000-00-0001 |          |
| * 510773   | ZBIKOWSKI    | RICHARD H. | 1527 N HOLDEN ST | ANYTOWN     | 000-00-0001 |          |
| * 506468   | BARTLEIN     | MELISSA    | 1529 MILL ST     | ANYTOWN     | 000-00-0001 |          |
| * 500248   | MACGILLIS    | SALLY      | 1529 N. 117TH ST | ANYTOWN     | 000-00-0001 |          |
| * 510495   | PIERCE       | JENNIFER   | 1529 S 92 ST     | ANYTOWN     | 000-00-0001 |          |
| 510519   | OCONNELL     | MARY       | 1529 ST CHARLES  | ANYTOWN     | 000-00-0001 |          |
| 100933   | WAUSEON AVE  | UNITED MET | 1529 WAUWATOSA A | ANYTOWN     | 000-00-0001 |          |
| 511602   | KRISHON      | ANNA MARIA | 153 MARKET ST.   | ANYTOWN     |             |          |
| 509137   | CAIRO        | MALISA     | 153 MORRIS ST #  | ANYTOWN     | 000-00-0001 |          |
| 504302   | LANE         | STEVE      | 1530 BROOKHAVEN  | ANYTOWN     | 000-00-0001 |          |
|  |              |            |                  |             |             |          |
| F1-Next Page F2-Prev Page F3-AR/RTD Hist F4-Chg F5-Delete F6-Add |              |            |                  |             |             |          |

**Figure 9- 4 Customer Maintenance Screen (customers by address)**

**Listing available customers (by drivers license)**

If you wanted to look up a customer by driver's license number, you would enter a full or partial driver's license number and press the F2 key. In the following example, P362 was entered and the F2 key was pressed. All customers on file whose driver's license number began with P362 are listed on the screen in numerical order as seen in Figure 9-5. Note that if no Driver's License is in the customer record, the display screen will show City in the customer record.

| Customer Maintenance  |              |                |                  |                  |             | 12/20/04 |
|-----------------------|--------------|----------------|------------------|------------------|-------------|----------|
| Customer Name/#: P362 |              |                |                  |                  |             |          |
| Acct Nbr              | Last Name    | First Name     | Address          | DL# Or City      | S S A N     |          |
| * 504735              | PETERSON     | MARY           | 8035 W LAKESHORE | P3625983783800   | 000-00-0001 |          |
| 504447                | PETERS       | TIM            | 3509 N BRITTON R | P3628015233703   | 000-00-0001 |          |
| * 504736              | PHELPS       | MARLENE        | 262 WESTFIELD WA | P4125526364001   | 000-00-0001 |          |
| 504717                | PULKOWNIK    | MARK           | 3201 NICHOLSON A | P425-5415-8456-0 | 000-00-0001 |          |
| * 504671              | PILGER       | TERESA         | 869 NORTH ST     | P4268016592002   | 000-00-0001 |          |
| 504691                | PLATEK       | DEANNA         | W174 N9007 ROOSE | P4321706174506   | 000-00-0001 |          |
| 504593                | POLUM        | JAMES          | 712 BEEKMAN ST   | P4504536102702   | 000-00-0001 |          |
| * 504536              | PYNE         | LYNN           | 1911 WEST SHORE  | P500-5375-6824-0 | 000-00-0001 |          |
| 505387                | PINKOS       | KATHRYN        | 126 S UNIVERSITY | P5225136867903   | 000-00-0001 |          |
| 505050                | PERRY        | JIMMY          | 112 MELODY CIRCL | P6004336428306   | 000-00-0001 |          |
| * 504641              | PFARR        | PAMELA         | W142 N9792 AMBER | P6006766691501   | 000-00-0001 |          |
| * 504981              | PIERSON      | LORI           | 3506 OLD WOOD RD | P625-5216-0511-0 | 000-00-0001 |          |
| 504632                | PRUDHOMME    | KAREN          | 1820 OAK ST      | P6355136466403   | 000-00-0001 |          |
| * 505540              | PHARM        | CLIFTON        | 3631 N 50TH ST   | P6501015808708   | 000-00-0001 |          |
| 505281                | ROEPKE       | MARK           | 805 GRANDVIEW DR | R1205445713907   | 000-00-0001 |          |
| <hr/>                 |              |                |                  |                  |             |          |
| <hr/>                 |              |                |                  |                  |             |          |
| F1-Next Page          | F2-Prev Page | F3-AR/RTD Hist | F4-Chg           | F5-Delete        | F6-Add      |          |

**Figure 9- 5 Customer Maintenance Screen (customers by driver's license)**

### ***Listing available customers (by social security number)***

To find an exact match on a social security number, enter the entire social security number with no dashes and press the F3 key. To search by last four digits of social security number, enter the last four digits and press the F3 key. To search by beginning characters of social security number, enter beginning characters followed by zeros to complete the 9-digit number without dashes and press the F3 key. Customers will be displayed in numerical order by the social security search option you have chosen. See Figure 9-6.

| Customer Maintenance   |             |            |                  |             |             | 12/20/04 |
|--|-------------|------------|------------------|-------------|-------------|----------|
| Customer Name/#: 520000000   |             |            |                  |             |             |          |
| Acct Nbr   | Last Name   | First Name | Address          | DL# Or City | S S A N     |          |
| 501137   | FREDRICKSON | BETH       | 7927 WARREN AVE  | ANYTOWN     | 520-00-0001 |          |
| 502790   | FREEMAN     | JACQUELIN  | 199 E RIVERWOOD  | ANYTOWN     | 520-00-0001 |          |
| 506362   | FURNNER     | MICHAEL    | 1428 GLENBROOK D | ANYTOWN     | 520-00-0001 |          |
| 502396   | GAETH       | CHRISTINE  | 3321 S. 13TH STR | ANYTOWN     | 520-00-0001 |          |
| EOF  |             |            |                  |             |             |          |
| <hr/>  |             |            |                  |             |             |          |
| F1-Next Page   F2-Prev Page   F3-AR/RTO Hist   F4-Chg   F5-Delete   F6-Add |             |            |                  |             |             |          |

**Figure 9- 6 Customer Maintenance Screen (customers by social security number)**

### ***Listing available customers (by account number)***

If you wanted to look up a customer by account number, you would enter the full or partial account number and press the F4 key. In the following example, account number 200010 was entered and the F4 key was pressed. See Figure 9-7.

| Customer Maintenance    |           |            |                  |             |             | 12/20/04 |
|-------------------------|-----------|------------|------------------|-------------|-------------|----------|
| Customer Name/#: 200010 |           |            |                  |             |             |          |
| Acct Nbr                | Last Name | First Name | Address          | DL# Or City | S S A N     |          |
| 200010                  | BARTA     | JACK       | .                | ANYTOWN     | 000-00-0001 |          |
| 200011                  | BEADELL   | PRISCILLA  | 10224 N PORT WAS | ANYTOWN     | 000-00-0001 |          |
| 200012                  | BEITCHER  | LISA       | 607 YELLOWSTONE  | ANYTOWN     | 000-00-0001 |          |
| 200013                  | BEHNKE    | MIRIAM     | 824 RICHARDS AVE | ANYTOWN     | 000-00-0001 |          |
| 200014                  | BEUTIN    | JANICE     | 1574 S. 97TH ST. | ANYTOWN     | 000-00-0001 |          |
| 200015                  | BELL      | JON        | W158 N8396       | ANYTOWN     | 000-00-0001 |          |
| 200016                  | MUSIC     | BEL-AIR    | 4733 S. PACKARD  | ANYTOWN     | 000-00-0001 |          |
| 200017                  | BIRKEL    | CLARA      | W727 ROLEFSON RD | ANYTOWN     | 000-00-0001 |          |
| 200018                  | BORMAN    | PATRICK    | 2630 A N. BARTL  | ANYTOWN     | 000-00-0001 |          |
| 200019                  | BRADLEY   | SUSAN      | 405 OAKRIDGE COU | ANYTOWN     | 000-00-0001 |          |
| 200020                  | BOGART    | JOAN       | 17755 E WHEELER  | ANYTOWN     | 000-00-0001 |          |
| 200021                  | BRUBAKER  | ANDREW     | 2845 N. FRATNEY  | ANYTOWN     | 000-00-0001 |          |
| 200022                  | BRYANT    | NATHAN     | 307 NORTH STREET | ANYTOWN     | 000-00-0001 |          |
| 200023                  | BRUMMUND  | WALTER     | 1701 WEDGEWOOD W | ANYTOWN     | 000-00-0001 |          |
| * 200024                | BRENGOSZ  | MELISSA    | W335N5337 WEDGEW | ANYTOWN     | 000-00-0001 |          |

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F1-Next Page    F2-Prev Page    F3-AR/RTD Hist    F4-Chg    F5-Delete    F6-Add

**Figure 9- 7 Customer Maintenance Screen (customers by account number)**

### ***Find Customer by home phone number***

If you wanted to find a customer by his/her home phone number, enter the entire home phone number, using no spaces or dashes (include the area code) and press the F6 key.

### ***Changing customer information***

Place the cursor next to a customer on the list and press the F4 key or press the ENTER key. The screen will now show the customer data, see Figure 9-8.

| Customer Change  |                                | 11/20/06                           |
|--|--------------------------------|------------------------------------|
| Customer/Or:   | SAKS , CHARLES                 | Acct#: 10012234                    |
| Company Name:  |                                |                                    |
| Contact Name:  |                                |                                    |
| Address:   | 123 ABC STREET                 |                                    |
| Address Line 2:  |                                |                                    |
| Zip/City/State:  | 11111-0000 CORPUS CHRISTI TX   | Map Code:                          |
| Home Phone Nbr:  | (000)000-0001                  | Work Phone Nbr: (000)000-0001 Ext: |
| Cell Phone Nbr:  | (000)000-0001                  | Pager Phone Nbr:                   |
| Fax Phone Nbr:   |                                | Birth Date: Marketing Info         |
| SSAN:  | 456-00-0004                    | Drivers License Nbr: 1             |
| Taxable?: Y  | Tax Codes                      | Bill To Number:                    |
| Tax Number:  |                                |                                    |
| Charge Cust: Y   | Retail Discount Level:         |                                    |
| Credit Limit: 10,000   | Default Retail Pmt Form: 27    |                                    |
| Status Flag:   | Default: Salesperson/Acct Mgr: |                                    |
| Customer Type: 0   | RTO Recv:                      |                                    |
| Email Address:   |                                |                                    |
| Bank/CC Info:  | MC 22222222222222222222        | 02/09                              |
| Default PO Nbr:  | Best Time to Call: AFTER 5     |                                    |
| Enter the customer's last name or leave blank for Company Name                 |                                |                                    |
| <hr/> F1-References F2-Employer F3-Landlord F4-2nd Cust F6-Comment F7-Car Info |                                |                                    |

**Figure 9- 8 Customer Change Screen**

Using the ENTER key or arrow key, move to the field(s) you need to change and enter the new information. When you have made the necessary changes, press the F9 key. You will be prompted "Any More Changes". When this is answered with an N for no, you will be returned to the screen listing of the customers. If you need to make corrections again, answer with a Y for yes, correct your errors and answer with a N for no, you will be returned to the screen listing of the customers.

### ***Adding a customer***

To add a customer to the system, press the F6 key. You will now see a screen as shown in Figure 9-9.

| Customer Add   |                                | 11/20/06                 |
|--|--------------------------------|--------------------------|
| Customer/Or:   | ,                              | Acct#:                   |
| Company Name:  |                                |                          |
| Contact Name:  |                                |                          |
| Address:   |                                |                          |
| Address Line 2:  |                                |                          |
| Zip/City/State:  | 11111-0000 CORPUS CHRISTI TX   | Map Code:                |
| Home Phone Nbr:  | Work Phone Nbr:                | Ext:                     |
| Cell Phone Nbr:  | Pager Phone Nbr:               |                          |
| Fax Phone Nbr:   | Birth Date:                    | Marketing Info           |
| SSAN:  | Drivers License Nbr:           |                          |
| Taxable?: Y  | Tax Codes                      | Bill To Number:          |
| Tax Number:  |                                |                          |
| Charge Cust: N   | Retail Discount Level:         |                          |
| Credit Limit:  | 0                              | Default Retail Pmt Form: |
| Status Flag:   | Default: Salesperson/Acct Mgr: |                          |
| Customer Type:   | RTO Recv:                      |                          |
| Email Address:   |                                |                          |
| Bank/CC Info:  | 00/00                          |                          |
| Default PO Nbr:  | Best Time to Call:             |                          |
| Enter the customer's last name or leave blank for Company Name |                                |                          |
| F1-References  | F2-Employer                    | F3-Landlord              |
| F4-2nd Cust  | F7-Car Info                    |                          |

**Figure 9- 9 Customer Add Screen**

**CUSTOMER/OR:** Enter the customer's name, last name first, press the ENTER key and then enter the customer's first name, or if this is a business or institution, press the ENTER key until you are at the prompt "Company Name" and enter the business name. **NOTE:** Enter the Customer OR the Company name. Not both.

**ACCT #** The system will assign the next available number.

**COMPANY** If this is a business or institution, enter the name here. Note: Customer OR Company name to be entered. Not both.

**CONTACT NAME** If this is a company, you may enter the name of a contact person associated with the account here.

**ADDRESS** Enter the mailing address.

**ADDRESS LINE 2** Enter additional address information.

**ZIP/CITY/STATE** Enter in the zip code and the city and the state will fill in based on zip code. If the city and state do not fill in, call or email us at [www.rsssupport.com](http://www.rsssupport.com). You can enter to the corresponding field to change city and state if necessary; i.e. several cities are in this zip code.

**MAP CODE** Enter the map (code K 10). This field can also be used for Canadian postal code.



**HOME PHONE NUMBER** This is a required field. Enter the primary phone number for this customer. If they do not have a home/primary phone number, enter the number 1.

**WORK PHONE NUMBER** This is a required field. Enter the work phone number. If they do not have a work phone number, enter the number 1.

**CELL PHONE NUMBER** If the customer has a cell phone number, enter it here.

**PAGER PHONE NUMBER** If the customer has a pager number, enter it here.

**FAX PHONE NUMBER** If the customer has a fax machine enter the fax machine phone number here.

**BIRTH DATE** Enter the customer's birth date in MM/DD/YYYY format. For example: 03/05/1977.

**MARKETING INFO** Fill in necessary info and press the F9 key, see Figure 9-10.

| Customer Change   |                               | 01/10/07         |
|---|-------------------------------|------------------|
| Customer/Dr: SAKS   | , CHARLES                     | Acct#: 10012234  |
| Company Name:   |                               |                  |
| Contact Name:   |                               |                  |
| Address: 123 ABC STREET   |                               |                  |
| Address Line 2:   |                               |                  |
| Zip/City/State: 11111-0000 CORPUS CHRISTI TX                            |                               | Map Code:        |
| Home Phone Nbr: (000)000-0001   | Work Phone Nbr: (000)000-0001 | Ext:             |
| Cell Phone Nbr: (000)000-0001   | Pager Phone Nbr:              |                  |
| Fax Phone Nbr:  | Birth Date:                   | Marketing Info   |
| Own or Rent Home:   | Date:                         | Education:       |
| Miles From Store:   |                               | Gender:          |
| Marital Status:   |                               | Race:            |
| Rented Before:  |                               | Bankruptcy:      |
| Referral Name:  |                               | Adv Source Code: |
| Marketing OptOut:   |                               | Nbr Mthly Bills: |
| Bank Account Nbr:   |                               | Bank Name:       |
| Branch Location:  |                               | Acct Type:       |
| (O)wn or (R)ent Home  |                               |                  |
| F1-References F2-Employer F3-Student F4-2nd Cust F6-Comment F7-Car Info |                               |                  |

**Figure 9-10 Adding Marketing Information Window**

**SSAN** This is the social security number field. This is required and protected by security settings. If you do not require social security number, enter the number 1 here.

**DRIVER'S LICENSE NUMBER** This is a required field and protected by security settings. If you do not require a driver's license number, enter the number 1.

NOTE: If 1 is entered for the driver's license number, the system will display this customer's city in that field on all customer search functions, i.e. Take Payments.

NOTE: If a driver's license number or social security number other than 1 has been entered and that number is already on a customer record, the system will display the following message at the bottom of the screen "Social Security Number or Driver's License Number already on File: Continue: N:". Press the ENTER key to accept the default of N for no. This will take you back to the "Customer Name/#" prompt. Type in the number that was "already on file" and use the appropriate function key (F1 or F2) to find out what customer already has this number.

**TAXABLE** If this account is taxable, enter a Y for yes.

**TAX CODES** If you use the Service Department module you will be prompted to enter a default tax code here.

**BILL TO NUMBER** Only use this field if another party is to be billed for any accounts associated with this customer or company. For example, Jones purchase orders are paid by Jones Inc., you would enter Jones Inc. account number here.

**TAX NUMBER** If this is a non taxable customer, enter the Tax ID Number here. If you do not know the federal id number, enter the number "1".

**CHARGE CUSTOMER** Will this customer have a charge account at point of sale (Y for yes or N for no). If left at no, employees will not be able to set up an AR charge account for this customer. They will however be able to set up a layaway or special order account.

**RETAIL DISCOUNT LEVEL** You have the ability to insure this customer or company gets a discount on every sales transaction. Leave blank for no discount or choose one of the following options:

**Left blank** = No discount

**C** = Cash only

**D** = Discount

**O** = Discount is set at MOP Price (Manager Override Price).

**A** = Discount is set at MAP price (Minimum Acceptable Price).

In the next field you will be prompted to enter the discount percent if C or D was selected. See the Sales Control Record (SALECTRL) to determine if the discount will be off the List Price or Regular Price, and to set maximum discount percentage you will allow. Note: List, Regular, MAP, and MOP pricing are found on the model number of the items being sold.

**CREDIT LIMIT** If you answered Y for yes to allow customer charge, enter the credit limit here. NOTE: Proper security is required. A zero here indicates the customer has unlimited credit limit.

**DEFAULT RETAIL PMT FORM** To ensure an institution or business charges always go to the correct payment form you may enter it as a default here, or accept the blank default and enter to the next field.

**STATUS FLAG** This is a free form field. Information entered here will not appear on any report.

**DEFAULT SALESPERSON/ACCT MGR** When adding a sale or rental, the default Employee Number who gets credit for the transaction. Normally this field is left blank. If this is a builder, with a particular salesperson who will always get credit for all sales on this account, enter the employee number here. Next enter the default account manager that will be working customers account if they become past due on Sales AR or Rental payments. This field may also be left blank.

**CUSTOMER TYPE** Default customer type for future transactions. Customer type can be overridden in the Sales AR and RTO programs when adding new transactions for customer. Customer type will help you with your reporting and marketing.

**RTO RECV** This field gets updated automatically by RTO Receivable transactions.

**EMAIL ADDRESS** If the customer has an email address, you may enter it here.

**BANK/CC INFO** You can store customer's credit card or debit card information here. Enter the type of card as noted at the bottom of the screen and then enter the card number. You will also be prompted to enter a valid expiration date for this card number. This information is used in the AUTOPAY program. Proper security is required to access and view this field.

**VS** = Visa

**MC** = Mastercard

**DI** = Discover

**AM** = American Express

**OT** = Other

**DB** = Bank Draft.

**DEFAULT PO NBR** You can enter an open purchase order number for this account's future sales accounts receivable invoices. Enter the word "HOLD" to prevent any billing on this account until a purchase order number is added to the individual AR invoice.

**SCREEN PROMPTS** - at the bottom of the screen you will see screen prompts:

**F1**-References

**F2**-Employer

**F3**-Landlord

**F4**-Second Customer

**F6**-Comments

**F7**-Car Information

Following are examples of the screen prompts and optional additional information for this customer.

## F1 - Adding a reference

While at the Customer Add Screen, you will see prompts on the bottom of the screen. Press the F1 key to add references on this account. You will see a screen similar to Figure 9-11. You can enter up to six different references.

**NOTE: Screen Prompts are at the bottom of the screen; you must press the F9 key through both pages of references to save additions or changes.**

|   |  |
|---|--|
| Customer/Dr: SAKS<br>Company Name:<br>Contact Name:<br>Address: 123 ABC STRE<br>Address Line 2:<br>Zip/City/State: 11111-0000 C<br>Home Phone Nbr: (000)000-000<br>Cell Phone Nbr: (000)000-000<br>Fax Phone Nbr:<br>SSAN: 456-00-0004<br>Taxable?: Y Tax<br>Tax Number:<br>Charge Cust: Y<br>Credit Limit: 10,000<br>Status Flag: Default<br>Customer Type: 0<br>Email Address:<br>Bank/CC Info: MC 222222222<br>Default PO Nbr: | <div style="border: 1px solid black; padding: 5px;">         Name: DOUGH , JANE<br/>         Add: 127 ABC STREET<br/>         Add2:<br/>         City: CORPUS CHRISTI TX 11111-<br/>         Ph: (333)333-3333 Map Code:<br/>         Rel: NEIGHBOR<br/>         Name: ,<br/>         Add:<br/>         Add2:<br/>         City: CORPUS CHRISTI TX 11111-<br/>         Ph: Map Code:<br/>         Rel:<br/>         Name: ,<br/>         Add:<br/>         Add2:<br/>         City: CORPUS CHRISTI TX 11111-<br/>         Ph: Map Code:<br/>         Rel:       </div> |
| Relationship of this reference to the customer  |  |
| F8-Backout      F9-Second Page      F10-Exit      ENTER-Next Field  |  |

**Figure 9-11 Adding a Reference Window**

## F2 - Adding an employer

Press the F2 key and you will be able to add their employer information, see Figure 9-12. Payday information you enter here will appear in the Take Payments (RP) screen for the customer. Best time to call information will also display in Take Payments (RP) screen for this customer.

| Customer Change   |  | 11/20/06        |
|---|--|-----------------|
| Customer/Or: SAKS   | , CHARLES  | Acct#: 10012234 |
| Company Name:   |  |                 |
| Contact Name:   |  |                 |
| Address: 123  | <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Work Information</p> <p>Company: XYZ CORPORATION</p> <p>Add: XYZ BLVD</p> <p>Add2: STE 1111</p> <p>City: CORPUS CHRISTI TX 11111-</p> <p>Map Code:</p> <p>PayDays: FRIDAY                      Frequency: B</p> <p>Income: 5,000.00                      Full/Part Time: F</p> <p>Shift: 8-5                              Date Employed: 8/02/06</p> <p>Position: SHIPPING CLERK</p> <p>Supervisor: SMITH</p> <p>Comment: █</p> </div> |                 |
| Address Line 2:   |  |                 |
| Zip/City/State: 1111  |  |                 |
| Home Phone Nbr: (000  |  |                 |
| Cell Phone Nbr: (000  |  |                 |
| Fax Phone Nbr:  |  |                 |
| SSAN: 456-  |  |                 |
| Taxable?: Y   |  |                 |
| Tax Number:   |  |                 |
| Charge Cust: Y  |  |                 |
| Credit Limit: 10,   |  |                 |
| Status Flag:  |  |                 |
| Customer Type: 0  |  |                 |
| Email Address:  |  |                 |
| Bank/CC Info: MC 2  |  |                 |
| Default PO Nbr:   |  |                 |
| Miscellaneous notes(department,supervisor,extension,etc.)   |  |                 |
| <div style="display: flex; justify-content: space-between;"> <span>F8-Backout</span> <span>F9-Update Record</span> <span>F10-Exit</span> <span>ENTER-Next Field</span> </div> |  |                 |

Figure 9-12 Adding an Employer Window

### F3 - Adding a landlord

Press the F3 key and you will be able to add landlord information. You can add information about the customer's residence or the landlord he rents from or if he owns a house, mortgage information or other information related to the customer's dwelling. See Figure 9-13. This information will now show up on the contact list in the enhanced collections (optional) module.

| Customer Change   |  | 11/20/06        |
|---|--|-----------------|
| Customer/Or: SAKS   | , CHARLES  | Acct#: 10012234 |
| Company Name:   |  |                 |
| Contact Name:   |  |                 |
| Address: 123 A  | <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Landlord Information</p> <p>Apt: ABC APTS</p> <p>Mgr: BAKER</p> <p>Or Landlord's Name</p> <p>Name: ,</p> <p>Monthly Pmt: 600.00</p> <p>Mortgage Co: NONE</p> <p>Add:</p> <p>Add2:</p> <p>City: CORPUS CHRISTI TX 11111-</p> <p>Ph: 333-333-3333 █ Map Code:</p> </div> |                 |
| Address Line 2:   |  |                 |
| Zip/City/State: 11111   |  |                 |
| Home Phone Nbr: (000)   |  |                 |
| Cell Phone Nbr: (000)   |  |                 |
| Fax Phone Nbr:  |  |                 |
| SSAN: 456-0   |  |                 |
| Taxable?: Y   |  |                 |
| Tax Number:   |  |                 |
| Charge Cust: Y  |  |                 |
| Credit Limit: 10,0  |  |                 |
| Status Flag:  |  |                 |
| Customer Type: 0  |  |                 |
| Email Address:  |  |                 |
| Bank/CC Info: MC 222  |  |                 |
| Default PO Nbr:   |  |                 |
| <div style="text-align: center;"> <p>Best Time to Call: AFTER 5</p> <p>Landlord's phone number</p> </div>   |  |                 |
| <div style="display: flex; justify-content: space-between;"> <span>F8-Backout</span> <span>F9-Update Record</span> <span>F10-Exit</span> <span>ENTER-Next Field</span> </div> |  |                 |

Figure 9-13 Adding a Landlord Window

**F4 - Adding a second customer**

Press the F4 key and you will be able to add spouse, roommate, co-applicant information, if required. See Figure 9-14.

| Customer Change  |                                | 11/20/06        |
|--|--------------------------------|-----------------|
| Customer/Or: SAKS  | , CHARLES                      | Acct#: 10012234 |
| Company Name:  |                                |                 |
| Contact Name:  |                                |                 |
| Address: 123 ABC STRE  | Second Customer Info           |                 |
| Address Line 2:  |                                |                 |
| Zip/City/State: 11111-0000 C   | Name: SMITH , JOE              |                 |
| Home Phone Nbr: (000)000-000   | Add: 123 ABC STREET            |                 |
| Cell Phone Nbr: (000)000-000   | Add2:                          |                 |
| Fax Phone Nbr:   | City: CORPUS CHRISTI TX 11111- |                 |
| SSAN: 456-00-0004  | Ph: (333)333-3333 Map Code:    |                 |
| Taxable?: Y Tax  | W Ph: (444)444-4444            |                 |
| Tax Number:  | SSAN: 000-00-0001 DL#: 1       |                 |
| Charge Cust: Y   | Rel: ROOMMATE                  |                 |
| Credit Limit: 10,000   | BDte: 2/02/1970                |                 |
| Status Flag: Defaul  |                                |                 |
| Customer Type: 0   |                                |                 |
| Email Address:   |                                |                 |
| Bank/CC Info: MC 22222222222222222222                                      | 02/09                          |                 |
| Default PO Nbr:  | Best Time to Call: AFTER 5     |                 |
|  | Last name for this customer    |                 |
| <hr/> F8-Backout      F9-Update Record      F10-Exit      ENTER-Next Field |                                |                 |

**Figure 9-14 Adding a Second Customer Window**

**F6 - Adding a comment**

Press the F6 key and you will be able to add comments to this customer's record. See Figure 9-15.

| Customer Change   |                              | 11/20/06  |
|---|------------------------------|---|
| Customer/Or:  | SAKS , CHARLES               | Acct#: 10012234                                 |
| Company Name:   |                              |   |
| Contact Name:   |                              |   |
| Address:  | 123 ABC STREET               |   |
| Address Line 2:   |                              |   |
| Zip/City/State:   | 11111-0000 CORPUS CHRISTI TX | Map Code:                                       |
| Home Phone Nbr:   | (000)000-0001                | Work Phone Nbr: (000)000-0001 Ext:              |
| Cell Phone Nbr:   | (000)000-0001                | Pager Phone Nbr:                                |
| Fax Phone Nbr:  |                              | Birth Date:                      Marketing Info |
| <div style="border: 1px solid black; height: 80px; width: 100%;"></div>                                 |                              |   |
| C   |                              |   |
| Cr  |                              |   |
| S   |                              |   |
| Cus   |                              |   |
| Ema   |                              |   |
| Ban   |                              |   |
| Enter Comment, and press F9 when done<br>Enter the customer's last name or leave blank for Company Name |                              |   |
| F1-Fwrd F2-Back F9-Done F10-Abort HOME-Top PG DN-Del Line PG UP-Ins Line                                |                              |   |

**Figure 9-15 Adding Customer Comments Window**

You may enter any comments you wish here. When you have finished entering your comments, press the F9 key. There is room here for 50 lines of comments. They will only be displayed in the Customer Maintenance (RCUSTMNT) program and available in On Screen Collections (TICKDUE) under reference information.

### **F7 - Adding car info**

Press the F7 key and you will be able to add information on the customer's vehicle, if required. See Figure 9-16. You may enter information for two different vehicles.

| Customer Change  |  | 11/20/06        |
|--|--|-----------------|
| Customer/Or: SAKS  | , CHARLES  | Acct#: 10012234 |
| Company Name:  |  |                 |
| Contact Name:  |  |                 |
| Address: 123 AB  | <div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Car Information</p> <p>License: 123ABC</p> <p>VIN Nbr: A124560CF0034IDM99999</p> <p>Year: 2000</p> <p>Make: FORD</p> <p>Model: MUSTANG</p> <p>Desc: RED GT</p> <br/> <p>Lien: NONE</p> <p>Phone #:                      per</p> <p>Pmt Amt:                      per</p> <p>Purchase Date: <input type="text"/></p> </div> |                 |
| Address Line 2:  |  |                 |
| Zip/City/State: 11111-   |  |                 |
| Home Phone Nbr: (000)0   |  |                 |
| Cell Phone Nbr: (000)0   |  |                 |
| Fax Phone Nbr:   |  |                 |
| SSAN: 456-00   |  |                 |
| Taxable?: Y  |  |                 |
| Tax Number:  |  |                 |
| Charge Cust: Y   |  |                 |
| Credit Limit: 10,00  |  |                 |
| Status Flag:   |  |                 |
| Customer Type: 0   |  |                 |
| Email Address:   |  |                 |
| Bank/CC Info: MC 2222  |  |                 |
| Default PO Nbr:  | Best Time to Call: AFTER 5   | Date Purchased  |
| <hr/> F8-Backout      F9-Second Page      F10-Exit      ENTER-Next Field |  |                 |

Figure 9-16 Adding Car Information Window

Once the information has been entered, the prompt "Any More Changes:" will be displayed, see Figure 9-17.

| Customer Change  |                                | 11/20/06        |
|--|--------------------------------|-----------------|
| Customer/Or: SAKS  | , CHARLES                      | Acct#: 10012234 |
| Company Name:  |                                |                 |
| Contact Name:  |                                |                 |
| Address: 123 ABC STREET  |                                |                 |
| Address Line 2:  |                                |                 |
| Zip/City/State: 11111-0000 CORPUS CHRISTI TX   | Map Code:                      |                 |
| Home Phone Nbr: (000)000-0001  | Work Phone Nbr: (000)000-0001  | Ext:            |
| Cell Phone Nbr: (000)000-0001  | Pager Phone Nbr:               |                 |
| Fax Phone Nbr:   | Birth Date:                    | Marketing Info  |
| SSAN: 456-00-0004  | Drivers License Nbr: 1         |                 |
| Taxable?: Y  | Tax Codes                      | Bill To Number: |
| Tax Number:  |                                |                 |
| Charge Cust: Y   | Retail Discount Level:         |                 |
| Credit Limit: 10,000   | Default Retail Pmt Form: 27    |                 |
| Status Flag:   | Default: Salesperson/Acct Mgr: |                 |
| Customer Type: 0   | RTO Recv:                      |                 |
| Email Address:   |                                |                 |
| Bank/CC Info: MC 22222222222222222222  | 02/09                          |                 |
| Default PO Nbr:  | Best Time to Call: AFTER 5     |                 |
| Any More Changes: <input type="text"/>   |                                |                 |
| <hr/> F1-References   F2-Employer   F3-Landlord   F4-2nd Cust   F6-Comment   F7-Car Info |                                |                 |

Figure 9-17 Customer Add Screen with data

If you need to go back and make changes, enter Y for yes. If not, press the ENTER key to accept the default of N for no. Press the F9 key when you are done and you will be taken back to the Customer Maintenance Screen, Figure 9-2.