Chapter 2 - Change Customer Data - RCUSTMNT

This program is used to update or change information on a customer. To enter this program, select the option "Add/Change a Customer - RCUSTMNT" off of the Sales Menu or press the F10 key and at the command line type in "RCUSTMNT". See Figure 2-1. The first customer maintenance screen you see will look like Figure 2-2.

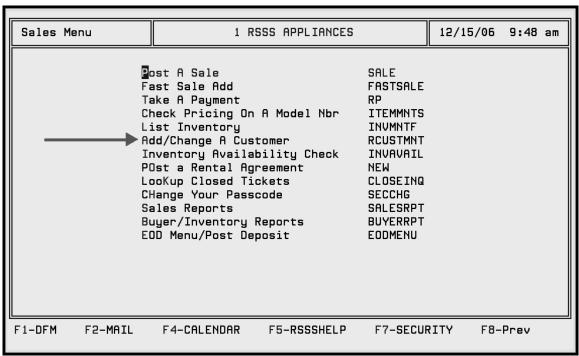


Figure 2- 1 Sales Menu

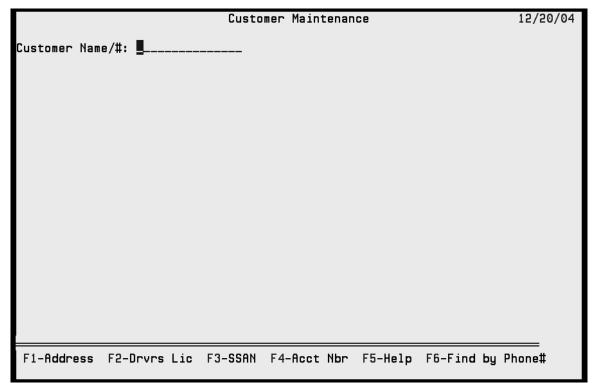


Figure 2- 2 Customer Maintenance Screen

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 2-3.

	Acct Nbr Last Name First Name Address DL# Or City S S A N							
X	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		
K	505608	MCCANN	SUSAN	119 BIRCH RD.	ANYTOWN	000-00-0001		
	510143	MCCARTHY	CATHY	1905 N 2ND DRIVE	ANYTOWN	000-00-0001		
K	500414	MCCARTHY	PAM	30828 KETTERHAGE	ANYTOWN	000-00-0001		
	506603	MCCARTHY	SCOTT	172 N ELMWOOD	ANYTOWN	000-00-0001		
K	505961	MCCARTY	APRIL	13575 WRAYBURN R	ANYTOWN	000-00-0001		
	502808	MCCAW	KATHY	1471 PARTRIDGE H	ANYTOWN	000-00-0001		
K	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		
K	510588	MCCLINTOCK	TOM	1329 CROWLEY AVE	ANYTOWN	000-00-0001		
	502422	MCCLONE	LYNN	W169 N4961 HERIT	ANYTOWN	000-00-0001		
K	EAGAAA	MCCLOSKEY	KATHERINE	825 THOMAS DR	ANYTOWN	000-00-0001		

Figure 2- 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 2-4.

			Custo	omer Maintenance		12/20/04	
Customer Name/#: 1526							
* * * * *	503250 507643 511546 507705 503265 506403 510773 506468	DANNER-SUSTI WADDICH WENZLER GALL ZBIKOWSKI BARTLEIN	CHRISTIAN AMY DAWN RICHARD H. MELISSA	1526 GRANDVIEW A 1526 MOONLIT CT 1526 N 50TH ST 1526 N JACKSON S 1526 RIDGE CT 1527 GALAXY CT 1527 N HOLDEN ST 1529 MILL ST	ANYTOWN ANYTOWN ANYTOWN ANYTOWN ANYTOWN ANYTOWN ANYTOWN ANYTOWN	S S A N 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001	
* *	510495 510519 100933	OCONNELL WAUSEON AVE KRISHON CAIRO	SALLY JENNIFER MARY UNITED MET ANNA MARIA MALISA STEVE	1529 N. 117TH ST 1529 S 92 ST 1529 ST CHARLES 1529 WAUWATOSA A 153 MARKET ST. 153 MORRIS ST # 1530 BROOKHAVEN	ANYTOWN ANYTOWN	000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001	
F1-	F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add						

Figure 2- 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 2-5. Note that if no Driver's License is in the customer record, the display screen will show City in the customer record.

			Custo	omer Maintenance		12/20/04		
Cus	Customer Name/#: P362							
A	cct Nbr	Last Name	First Name	Address	DL# Or City	SSAN		
×	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		
F1	-Next Pa	age F2-Pre	v Page F3-f	AR/RTO Hist F4-0	Chg F5-Delete	F6-Add		

Figure 2- 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 2-6.

	Cust	omer Maintenance		12/20/04			
Customer Name/#: 520000000							
	BETH JACQUELIN MICHAEL	Address 7927 WARREN AVE 199 E RIVERWOOD 1428 GLENBROOK D 3321 S. 13TH STR	ANYTOWN ANYTOWN	S S A N 520-00-0001 520-00-0001 520-00-0001 520-00-0001			
F1-Next Page F2-Prev	Page F3-	AR/RTO Hist F4-0	Chg F5-Delete	F6-Add			

Figure 2- 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 2-7.

			Custo	omer Maintenance		12/20/04	
Customer Name/#: 200010							
*	200010 200011 200012 200013 200014 200015 200016 200017 200018 200019 200020 200021 200022 200023	BEADELL BEITCHER BEHNKE BEUTIN BELL MUSIC BIRKEL BORMAN BRADLEY BOGART BRUBAKER	First Name JACK PRISCILLA LISA MIRIAM JANICE JON BEL-AIR CLARA PATRICK SUSAN JOAN ANDREW NATHAN WALTER MELISSA	Address . 10224 N PORT WAS 607 YELLOWSTONE 824 RICHARDS AVE 1574 S. 97TH ST. W158 N8396 4733 S. PACKARD W727 ROLEFSON RD 2630 A N. BARTL 405 OAKRIDGE COU 17755 E WHEELER 2845 N. FRATNEY 307 NORTH STREET 1701 WEDGEWOOD W W335N5337 WEDGEW	ANYTOWN	S S A N 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001 000-00-0001	
F1-	-Next Pa	age F2-Prev	v Page F3-1	AR/RTO Hist F4-0	Chg F5-Delete	F6-Add	

Figure 2- 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 2-8.

```
Customer Change
                                                                        11/20/06
                                               Acct#: 10012234
   Customer/Or: SAKS
                                . CHARLES
  Company Name:
  Contact Name:
       Address: 123 ABC STREET
Address Line 2:
Zip/City/State: 11111-0000 CORPUS CHRISTI TX
Home Phone Nbr: (000)000-0001 Work Phone Nbr: (000)000-0001 Ext:
Cell Phone Nbr: (000)000-0001 Pager Phone Nbr:
Right Page: Marketin
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 222222222222222222
Default PO Nbr:
                                Best Time to Call: AFTER 5
        Enter the customer's last name or leave blank for Company Name
 F1-References F2-Employer F3-Landlord F4-2nd Cust F6-Comment F7-Car Info
```

Figure 2- 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 2-9.

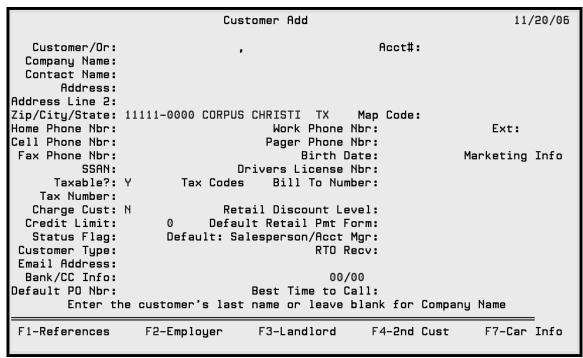


Figure 2- 9 Customer Add Screen

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 mailto:support@rsss.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 2-10.

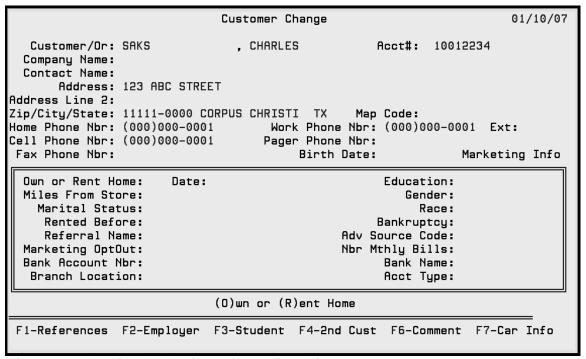


Figure 2-10 Adding Marketing Information Window

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

 \mathbf{C} = Cash only

 $\mathbf{D} = Discount$

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 2-11. 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.

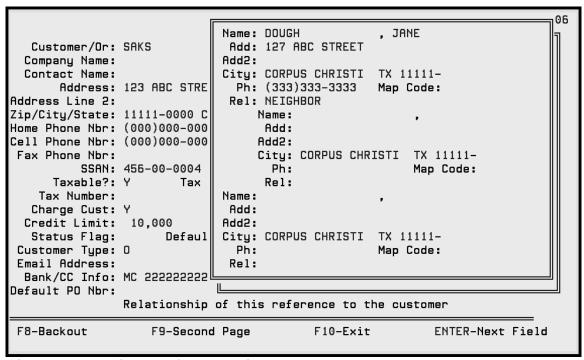


Figure 2-11 Adding a Reference Window

F2 - Adding an employer

Press the F2 key and you will be able to add their employer information, see Figure 2-12. 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.

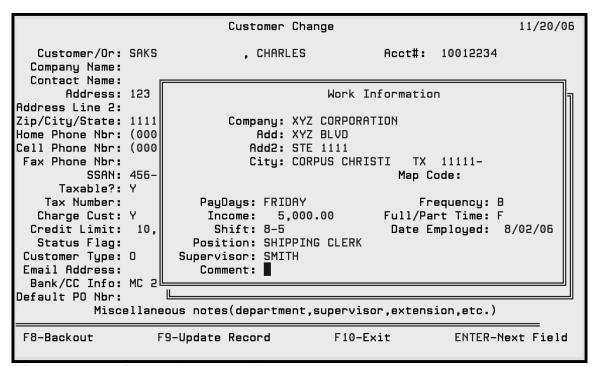


Figure 2-12 Adding an Employer Window

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 2-13. This information will now show up on the contact list in the enhanced collections (optional) module.

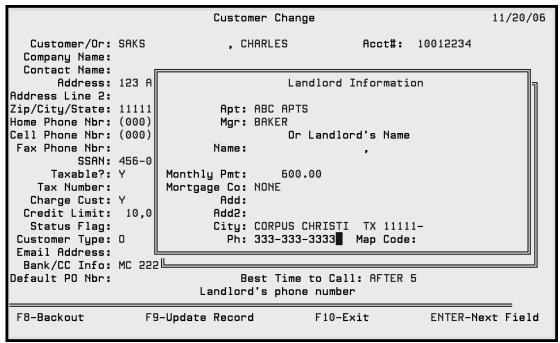


Figure 2-13 Adding a Landlord Window

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 2-14.

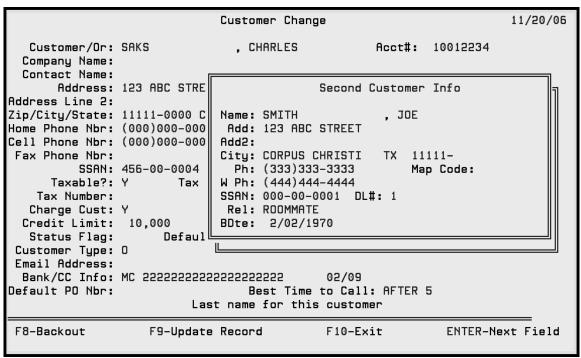


Figure 2-14 Adding a Second Customer Window

F6 - Adding a comment

Press the F6 key and you will be able to add comments to this customer's record. See Figure 2-15.

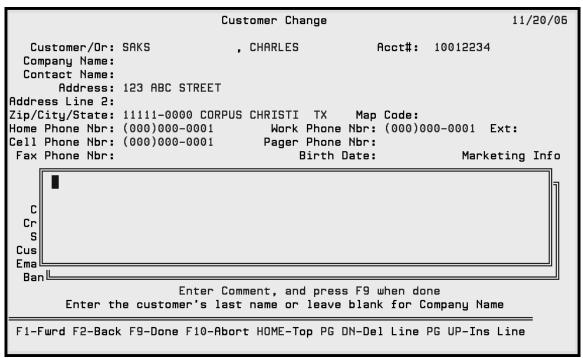


Figure 2-15 Adding Customer Comments Window

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 2-16. You may enter information for two different vehicles.

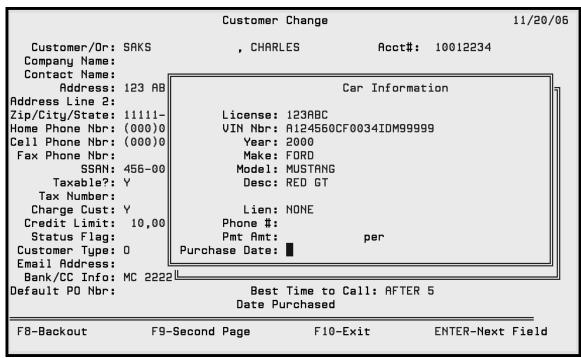


Figure 2-16 Adding Car Information Window

Once the information has been entered, the prompt "Any More Changes:" will be displayed, see Figure 2-17.

```
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: O RTO Recv:
 Email Address:
 Bank/CC Info: MC 22222222222222222
                                             02/09
Default PO Nbr:
                       Best Time to Call: AFTER 5
Any More Changes: N
F1-References F2-Employer F3-Landlord F4-2nd Cust F6-Comment F7-Car Info
```

Figure 2-17 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 2-2.