

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.

Sales Menu	1 RSSS APPLIANCES	12/15/06 9:48 am
Post A Sale	SALE	
Fast Sale Add	FASTSALE	
Take A Payment	RP	
Check Pricing On A Model Nbr	ITEMMNTS	
List Inventory	INUMNTF	
→ Add/Change A Customer	RCUSTMNT	
Inventory Availability Check	INVAVAIL	
POst a Rental Agreement	NEW	
LookUp Closed Tickets	CLOSEINQ	
CHange Your Passcode	SECCHG	
Sales Reports	SALESRPT	
Buyer/Inventory Reports	BUYERRPT	
EOD Menu/Post Deposit	EODMENU	

F1-DFM F2-MAIL F4-CALENDAR F5-RSSSHELP F7-SECURITY F8-Prev

Figure 2- 1 Sales Menu

Customer Maintenance 12/20/04

Customer Name/#:

F1-Address F2-Drvr's Lic F3-SSAN F4-Acct Nbr F5-Help F6-Find by Phone#

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.

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 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.

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	
<hr/>						
<hr/>						
F1-Next Page	F2-Prev Page	F3-AR/RT0 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.

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 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.

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 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.

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	
<hr/>						
F1-Next Page F2-Prev Page F3-AR/RT0 Hist F4-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
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 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.

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		
<hr/> <div> F1-References F2-Employer F3-Landlord F4-2nd Cust F7-Car Info </div>		

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.

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 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

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 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.

Customer/Dr: SAKS Company Name: Contact Name: Address: 123 ABC STRE Address Line 2: Zip/City/State: 11111-0000 C Home Phone Nbr: (000)000-000 Cell Phone Nbr: (000)000-000 Fax Phone Nbr: SSAN: 456-00-0004 Taxable?: Y Tax Tax Number: Charge Cust: Y Credit Limit: 10,000 Status Flag: Default Customer Type: 0 Email Address: Bank/CC Info: MC 22222222 Default PO Nbr:	<div style="border: 1px solid black; padding: 5px;"> Name: DOUGH , JANE Add: 127 ABC STREET Add2: City: CORPUS CHRISTI TX 11111- Ph: (333)333-3333 Map Code: Rel: NEIGHBOR Name: , Add: Add2: City: CORPUS CHRISTI TX 11111- Ph: Map Code: Rel: Name: , Add: Add2: City: CORPUS CHRISTI TX 11111- Ph: Map Code: Rel: </div>
Relationship of this reference to the customer	
F8-Backout F9-Second Page F10-Exit ENTER-Next Field	

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.

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

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.

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

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.

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	
F8-Backout	F9-Update Record	F10-Exit ENTER-Next Field

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.

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: 100px; width: 100%;"></div>		
C		
Cr		
S		
Cus		
Ema		
Ban		
Enter Comment, and press F9 when done 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 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.

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> <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/> <div style="display: flex; justify-content: space-between;"> F8-Backout F9-Second Page F10-Exit ENTER-Next Field </div>		

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: 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/> <div style="display: flex; justify-content: space-between;"> F1-References F2-Employer F3-Landlord F4-2nd Cust F6-Comment F7-Car Info </div>		

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.