CREATING CUSTOMERS - OPTION 200

Customer Accounts provide the framework to manage financing, billing, sales territories, commissions, customizing services and shipping.

Sales can be created through individual client accounts, through your Point-of-Sale (POS) account, #001, or through one account commonly referred to as your "Counter Sales" or "House" account, #99. POS and House accounts were automatically created in your Company Setup.

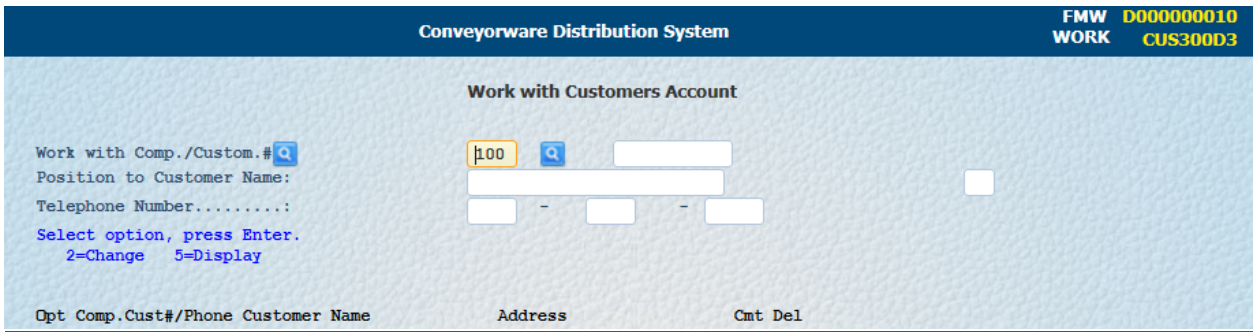
Individual customer accounts can be added by anyone with a **User Login**.

Login to www.conveyorware.com and select the "Web Access" login.

A short menu will appear.

1. Main Menu
2. Short Menu (See section 13.)
3. Gun Menu (See section 13.)
4. SignOff

Select **1. Main Menu**.
200. Customer Menu.
201. Work with Customers Account.



ADD A NEW CUSTOMER ACCOUNT.

- ➔ Verify the company number, **do not [Enter]. [Enter]** will create a list of your customers. If you do hit **[Enter]**, select **[Exit]** and begin again.
- ➔ Select **[Add].** The **Add a Customer** screen appears with the **Bill To Address** screen window over it. Fill in the billing information for the new customer and **[Enter]**.

The **Bill To Address** screen disappears so you see only the **Add a Customer** screen. This screen provides all customer details for invoicing.

Conveyorware Distribution System
FMW D000000010
ADD CUS305D1

Add a Customer

Company/Cust#..: 101 102
Bill to Name...: JOHN DOE
Bill to Address: 1234
AJY, MI 48484
State Abbr.....: MI 00
Pymt.Terms/Cred.Lmt. P
Crd. Review M/Y: 6 2014
NAICS Code.... 9999
Advertising Y/N: N
Telephone #....: 000 000 0000
Email:
A/P Fax #.....: 000 000 0000
B/Y Fax #.....: 000 000 0000
Note.....:
Resident.Code..:

A/R:
Inventory Mgmt FL
Creation MDY:
D & B Code. --
Review Code.: N
Territory # 1
Adv.Accr.Amt: .00
Contact: JOHN
Default Ship VIA:
Blanket PO:
Finance Chg%:
Commission %:
Discount %..:

Current : .00
01-30 D.: .00
31-60 D.: .00
> 61 D.: .00
Net AR.: .00
Pending: .00
Cur Sls: .00
LY Sls.: .00
High Credit.:
Adv. Paid: .00
UPS Acc:

****
* Press ENTER *
* for Shipping*
* Options *
* Window *
****

Help Cancel Prompt Jump SLS Hist ShipTo
F19=Acct Cmt Sls
Comments BillTo Toggle

➔ Review highlighted fields for accuracy and complete the Contact field. Complete any other fields you can, ie: e-mail address; telephone numbers; etc. If you have offered a customer a discount enter the discount percentage on this screen in the bottom right corner.

"Inventory Management" is a critical decision because it relates to your INVENTORY.

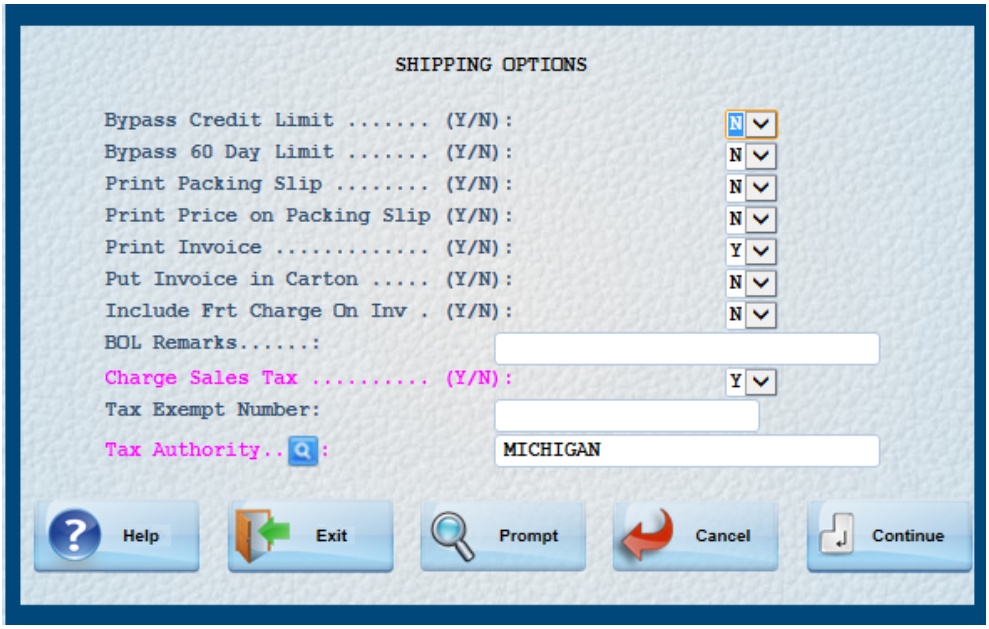
The default setting for "Inventory Management" is FL, as that is the most common. Other options are F and FA:

FL = Inventory sorted by stock ID AND stock serial number allowing FIFO (First in-First out).
(Order accuracy verified automatically.)
F = Inventory sorted by stock ID only so NOT FIFO specific.
(Order accuracy verified automatically.)
FA =Inventory sorted by stock ID only. Recommended for ONE stock item only.
(Order accuracy NOT verified automatically.)

Once you have completed everything you can on this screen **[Enter]** to display the **Shipping Options** screen.

➢**REMEMBER: Conveyorware has many "layers". Fields appear in menu options that you may not be using at this time. These fields have a purpose that you will understand and appreciate as your business grows!**

The following default settings will appear. These settings were identified earlier in "Getting Started" "Suggested Company Defaults." Review them again for this new customer.



- If a customer is tax exempt, select "N" in the "Charge Sales Tax" field and insert their Tax Exempt Number from documentation on file for that customer.

- If products are being sold through a Web store, sales tax will be addressed in that environment, not in Conveyorware.

- If products are being sold through the Conveyorware "Point of Sale" software, sales tax decisions will be based on the Warehouse State for that Point of Sale.

- State sales tax for all other sales must be determined and identified for each customer.

STATE TAX AUTHORITY

"Sales tax calculations" previously defaulted to "YES" in **625 Initial Company Setup**; however, the decision to charge sales tax is specific to each customer and identified here in the customer Shipping Options. (If you select "NO" in **625**, no tax fields will appear and no system reports will be available.)

Although the sales "tax authority" is pink, it will default to your Company's state location; however, the state tax for each customer must be verified based on their location and tax exemption status. In addition "Order Entry" allows the override of sales tax based on the 'ship-to' location. This will become clearer as you move forward.

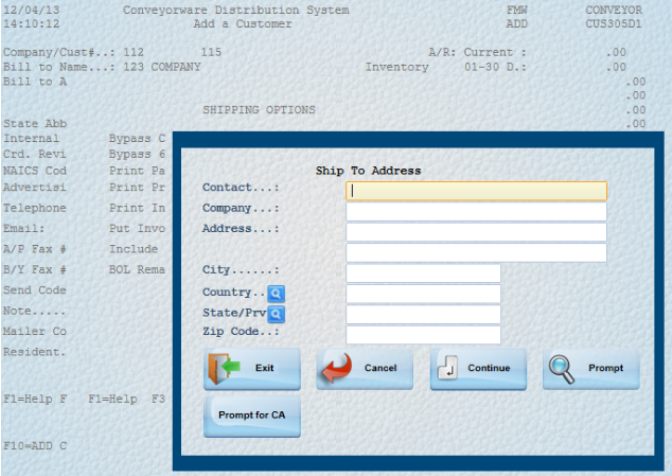
Note: Sales tax decisions are the responsibility of the User, not the Software.

TAX BODY MAINTENANCE

It is the responsibility of the User or Administrator, not Conveyorware, to insure the tax table is current for the State or States in which business is being conducted.

- ➔ Select Option 208 Work with Tax Bodies
- ➔ Insert State Abbreviation
- ➔ Select Change in the drop-down box
- ➔ Update Information **[Enter]**

Once the settings are correct for this customer **[Continue].** A **Ship to Address** box will appear.

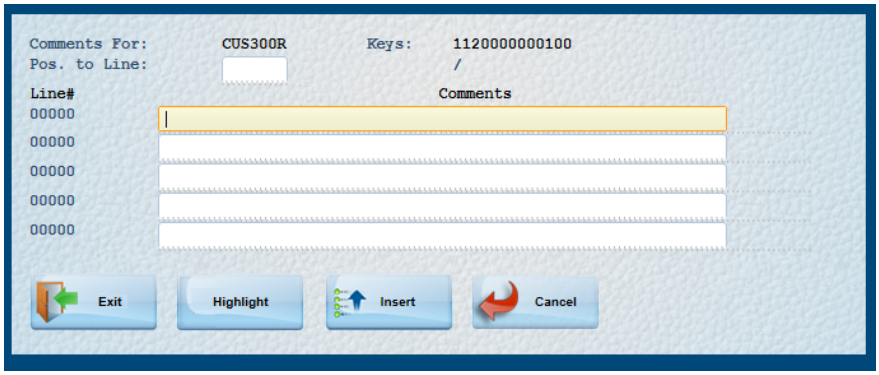


- ➔ Insert shipping information for this customer. **[Continue]** to display a list of your customers.

Review the list to verify the new customer has been added. **[Exit]** to return to the Customer menu.

COMMENTS

Comments can be recorded for each customer using the **[Acct Cmt]** button which appears on several customer screens.



CUSTOMER LISTS

Print a copy of your customer list using Option **213 Print Customer List.**

- ➔ Select the company
- ➔ Review default settings
- ➔ Select **[Print].**

You can also send a list of your customers to your e-mail address also using **213 Customer List.**

- ➔ Verify the company number and select **[CustListEmail].**
- ➔ Verify the e-mail address to receive the report and select **[Send Email].**

CHANGE OR DISPLAY CUSTOMER FILE

Changes to previously entered information can be made in the Customer menu item 201.

Select **201. Work with Customers Account**

- ➔ Verify company number and **[Enter].** A list of your customers will be displayed, sorted by customer name.
- ➔ Find the appropriate customer from the alphabetical list and click the drop down box for the appropriate action. (Customers can also be located by name or phone number.) **[Enter]**

Note: The "Bill To" and "Ship To" addresses can also be changed using the icons provided.

JUMP

Jump is available for obtaining details for a specific Customer. It allows the user to move quickly through the software to view a customer's entire record.

➔Select Option 201
➔Select a customer by number.
[Continue]
➔Select **Jump**

Type the letter of the screen you want to review into the Selection box. **[Continue**] That screen will appear for you to work in.