MISC CUSTOMER & BILLING

MULTIPLE SHIP TO ADRESSES

1. MULTIPLE SHIP TO ADDRESSES.
2. MAIN MENU PRESS 3 - CUSTOMER & BILLING.
3. PRESS D - MULTIPLE SHIP TO.
4. PRESS F6 TO ADD.
5. INPUT THE NAME, ADDRESSES, PHONE NUMBERS, & THE MASTER ACCOUNT NUMBER TO WHICH THIS ADDRESS IS CONNECTED AND PRESS F1.
6. CONTINUE INPUTTING UNTIL ALL OTHER LOCATIONS ARE “LINKED” TO THE MAIN ACCOUNT.
7. WHEN FINISHED PRESS F2.
8. ALL ENTRIES WILL BE LISTED HERE.
9. IF THE LIST IS LONG, YOU CAN SEARCH FOR THE LISTING WITH THE F1 KEY.
10. IF YOU WANT TO DELETE AN ENTRY, HIGHLIGHT THE ENTRY AND PRESS F3.
11. IF YOU WANT TO CHANGE AN ENTRY, HIGHLIGHT THE ENTRY AND PRESS F4. THE ORIGINAL TABLE WILL BE DISPLAYED SO YOU CAN MAKE ANY CHANGES. PRESS F2 WHEN FINISHED.

NOTES

STATEMENT & DUNNING MESSAGES

1. STATEMENT AND DUNNING MESSAGES. STATEMENT MESSAGE ALLOWS YOU TO ADD A MESSAGE TO PRINT ON THE STATEMENT WHEN IT PRINTS. A DUNNING MESSAGE IS AN AUTOMATICALLY PRINTED MESSAGE THAT PRINTS TO THE STATEMENT WHEN A CUSTOMER ACCOUNT GETS TO BE 30 OR MORE DAYS PAST DUE.
2. MAIN MENU PRESS 3 - CUSTOMER & BILLING.
3. PRESS 8 - PAYMENTS & BILLINGS.
4. PRESS B - STATEMENT MESSAGES.
5. PRESS 1 THRU 6 TO SET UP EACH OF THE MESSAGES YOU WANT TO CREATE.
6. WHEN FINISHED PRESS F2.
7. PRESS 7 FOR DUNNING MESSAGES.
8. YOU WILL NOTICE THAT THERE ARE 2 GROUPS FOR DUNNING. EACH GROUP HAS 30 – 60 – 90 – 120 DAYS
9. YOU CAN CREATE DIFFERENT DUNNING MESSAGES BASED ON A GROUP. (example - group a = senior citizens, relatives, etc. make nice reminders. Group b = bad paying, always on vacation on your dime, etc. make firmer reminders) .
10. TO SET THE DUNNING CODE TO THE CUSTOMER NUMBER, MAIN MENU PRESS 3 - CUSTOMER BILLING.
11. PRESS 1 - CUSTOMER INPUT.
12. INPUT CUSTOMER NUMBER AND PRESS ENTER.
13. YOU ARE NOW IN THE CUSTOMER SCREEN. PRESS ENTER 11 TIMES. PRESS RIGHT ARROW ONE TIME.
14. YOU WILL BE ON THE DUNNING MESSAGE LINE FOR THAT CUSTOMER. SET “A” FOR A GROUP MESSAGES OR “B” FOR B GROUP MESSAGES FOR THIS CUSTOMER.
15. PRESS F2 WHEN FINISHED.

NOTES

DIRECT INVOICE ADD (BACK OFFICE POSTING)

1. DIRECT INVOICE PROGRAM (BACK OFFICE POSTING). THIS PROGRAM ALLOWS YOU TO INPUT VALUES DIRECTLY TO A CHARGE ACCOUNT.
2. MAIN MENU PRESS 3 - CUSTOMER & BILLING.
3. PRESS 8 - PAYMENTS & BILLING.
4. PRESS 5 - DIRECT INVOICE – ADD.
5. INPUT CUSTOMER AND PRESS ENTER.
6. INPUT A REFERENCE (IF NEEDED) AND PRESS ENTER.
7. SET THE DATE TO WHAT YOU WANT AND PRESS ENTER.
8. INPUT THE AMOUNT TO PUT TO THE ACCOUNT. IF THE AMOUNT IS A CREDIT BE SURE TO MAKE THE AMOUNT IS A NEGATIVE.
9. AFTER ALL INFORMATION HAS BEEN ENTERED PRESS F1. A SYSTEM NUMBER WILL BE DISPLAYED FOR THE ENTRY. PRESS ENTER TO FINISH.PRESS F2 TO EXIT.
10. OPTION 6 - DIRECT INVOCIE - DELETE. THIS ALLOWS YOU TO REMOVE AN ENTRY THAT WAS DONE INCORRECTLY. USE THE SYSTEM NUMBER CREATED FROM DIRECT INVOICE – ADD.
11. OPTION 7 - DIRECT INVOICE – REPORTS. THIS ALLOWS YOU TO RUN REPORTS BY A DATE RANGE ON THE DIRECT INVOICES PUT TO THE ACCOUNTS.