❑ 7 : SETTING CUSTOMER FLAGS

1. PRESS 2 - CUSTOMER (PRICE/TAX/TERMS)
2. CUSTOMER FILE MAINTENANCE WILL BE DISPLAYED. THIS IS WHERE YOU SET THE CUSTOMERS INDIVIDUAL TERMS. MOST OPTIONS CAN BE FOUND BY HOLDING DOWN THE SHIFT AND HITTING THE ?. IF OPTIONS ARE AVAILABLE, THEY WILL BE DISPLAYED IN A BOX. PRESS ENTER TO CLEAR OPTIONS BOX.
3. ARROW TO THE CUSTOMER TO SET STARTING FROM THE TOP.
4. ON-ACNT - SET TO "Y" FOR CHARGE OR BLANK FOR CASH AND PRESS ENTER.
5. STATE = STATEMENT - CHECK OPTIONS. PRESS ENTER TO CLEAR OPTIONS BOX AND SET AS NEEDED. PRESS ENTER.
6. CLASS - CHECK OPTIONS. PRESS ENTER TO CLEAR OPTIONS BOX AND SET AS NEEDED. PRESS ENTER.
7. PR SCH = PRICE SCHEDULE - SET THE DESIRED PRICE SCHEDULE FOR THIS CUSTOMER AND PRESS ENTER.
8. SHOW DISCOUNT ON INVOICE - PRESS "Y" FOR YES OR BLANK FOR NO AND PRESS ENTER.
9. TAX SCH - SET TO THE TAX RATE FOR THIS CUSTOMER AND PRESS ENTER.
10. SALES TAX - PRESS "Y" FOR YES OR BLANK FOR NO AND PRESS ENTER.
11. FINANCE RATE - SET TO THE FINANCE CHARGE (IF ANY) THIS CUSTOMER WILL PAY FOR LATE PAYMENTS AND PRESS ENTER.
12. STATE TERMS - SET TO THE LINE CODE (A-O) IN THE STATEMENT TERMS BOX YOU WANT ATTACHED TO THIS CUSTOMER AND PRESS ENTER.
13. INV TERMS - SET TO THE LINE CODE (A-O) IN THE INVOICE TERMS BOX YOU WANT ATTACHED TO THIS CUSTOMER AND PRESS ENTER.
14. CONTINUE UNTIL ALL CUSTOMERS ARE SET AS NEEDED.

NOTES

15. TO VIEW MORE CUSTOMERS YOU CAN USE PAGE UP AND DOWN BUTTONS TO CHANGE SCREEN OR YOU CAN PRESS F1 TO FIND A CUSTOMER.

16. F5 REPEAT - THIS KEY WILL DUPLICATE YOUR PREVIOUS ENTRY GOING DOWN. (EXAMPLE – STATE FIELD PRESS "M" FOR MONTHLY DOWN ARROW ONCE, THEN PRESS F5 AND "M" WILL REPEAT STRIGHT DOWN). THIS CAN SAVE LOTS OF TIME.

17. WHEN FINISHED PRESS F2 BACK TO CUSTOMER & BILLING MENU.

18. PRESS 3 - CUSTOMER (FLAGS)

19. THERE ARE 4 MORE OPTIONS HERE THAT MAY NEED TO BE SET :

    PAY TYPE - ALLOWS YOU TO SET A CHARGE ACCOUNT TO BE A CASH ONLY (C) OR STOP SHIPMENT (S)
    NOPRT - ALLOWS YOU TO SET A CHARGE ACCOUNT TO NOT PRINT A STAEMENT (Y)
    NO CORE - ALLOWS YOU TO NOT CHARGE A CORE CHARGE BUT TRACKS CORE QUANTITY DUE TO BE RETURNED
    PO- REQ - REQUIRES A PO NUMBER ON THE INVOICE FOR THIS CUSTOMER

20. WHEN FINISHED PRESS F2 BACK TO CUSTOMER & BILLING

21. PRESS 4 - CUSTOMER CODES

22. THERE ARE 5 POSITIONS FOR CUSTOMER REPORT CODES. THESE CODES CAN BE USED FOR MULITPLE REASONS, REBATE BEING THE MOST COMMON. (EXAMPLE - IN CODES COLUMN 1 PUT A "W" ON ALL CUSTOMERS THAT WILL GET A WIX REBATE. WHEN THE REBATE TABLE IS SET UP, USE THE "W" IN CODES POSITION 1. THE REBATE REPORT WILL SEE ALL CUSTOMER SALES WITH THAT CODE). ALSO YOU CAN SET EXTRA INVOICE COPIES PER CUSTOMER TO PRINT - "Y", SET AN OUTSIDE SALESMAN CODE , AND INPUT THE CUSTOMERS RESALE NUMBER.

23. WHEN FINISHED PRESS F2 BACK TO MAIN MENU.

NOTES