

Chapter 6 – Lookup/Change/Add Customer Data - RCUSTMNT

This program is used to lookup, change or add information on a customer. To enter this program, select the option "Add/Change a Customer Info" off of the Customer Menu or press the F10 key and at the command line type in "RCUSTMNT". See Figure 6-1. The first customer maintenance screen you see will look like Figure 6-2.

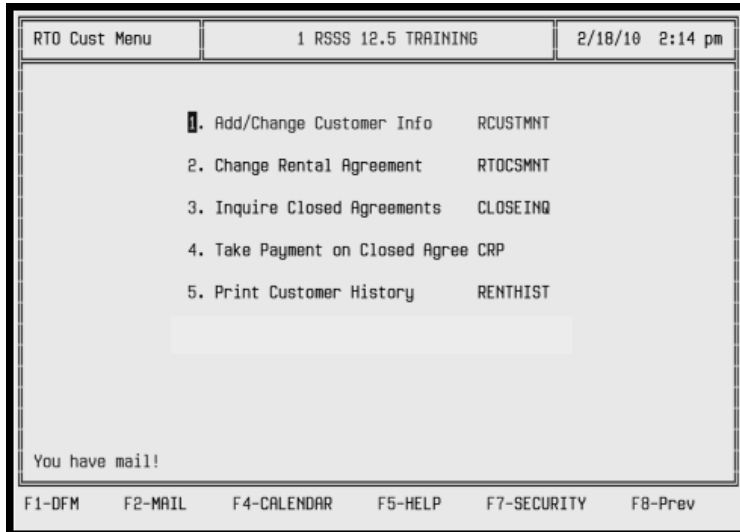


Figure 6- 1 Customer Menu

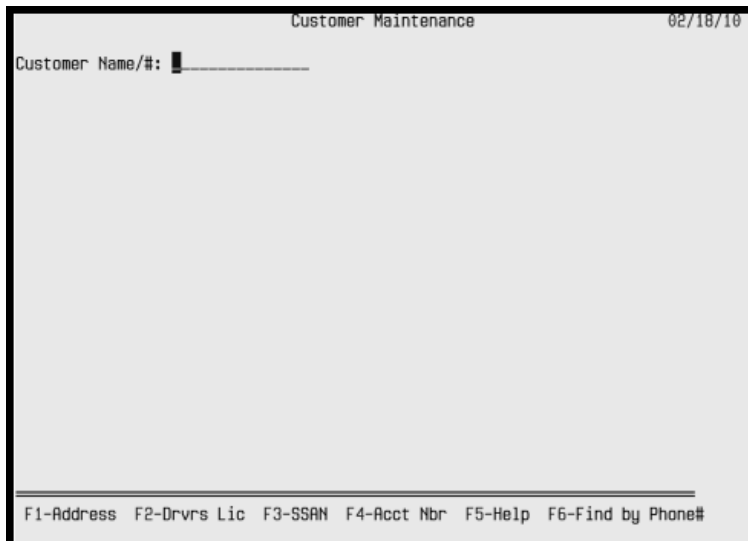


Figure 6- 2 Customer Maintenance Screen

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 - You may search by partial numeric address

F2-DRIVERS LICENSE NUMBER

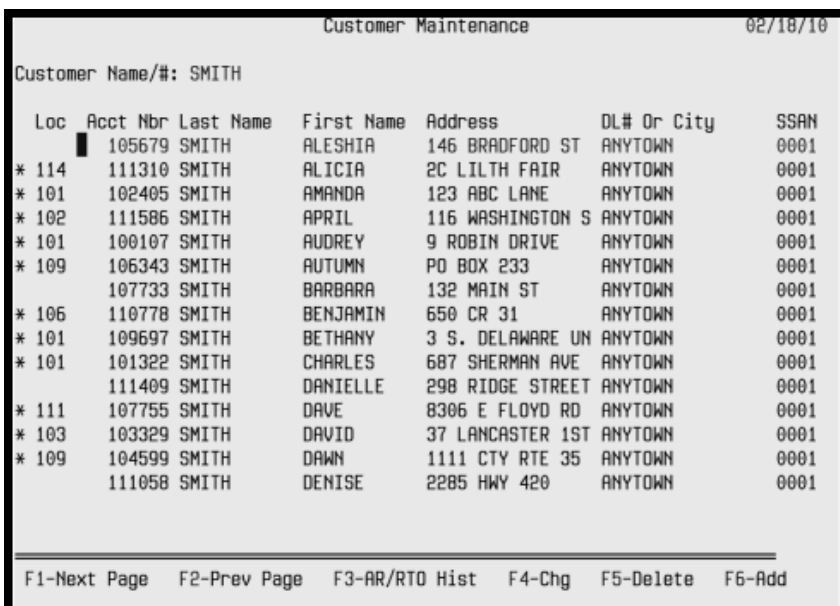
F3-SOCIAL SECURITY NUMBER

F4-ACCOUNT NUMBER

F6-PHONE NUMBER - Type in the entire phone number.

Looking up a customer 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. Press enter through the "0" store number and you will get a listing of customers in alphabetical order. See Figure 6-3.



Customer Maintenance 02/18/10

Customer Name/#: SMITH

Loc	Acct Nbr	Last Name	First Name	Address	DL# Or City	SSAN
	105679	SMITH	ALESHIA	146 BRADFORD ST	ANYTOWN	0001
* 114	111310	SMITH	ALICIA	2C LILTH FAIR	ANYTOWN	0001
* 101	102405	SMITH	AMANDA	123 ABC LANE	ANYTOWN	0001
* 102	111586	SMITH	APRIL	116 WASHINGTON S	ANYTOWN	0001
* 101	100107	SMITH	AUDREY	9 ROBIN DRIVE	ANYTOWN	0001
* 109	106343	SMITH	AUTUMN	PO BOX 233	ANYTOWN	0001
	107733	SMITH	BARBARA	132 MAIN ST	ANYTOWN	0001
* 106	110778	SMITH	BENJAMIN	650 CR 31	ANYTOWN	0001
* 101	109697	SMITH	BETHANY	3 S. DELAWARE UN	ANYTOWN	0001
* 101	101322	SMITH	CHARLES	687 SHERMAN AVE	ANYTOWN	0001
	111409	SMITH	DANIELLE	298 RIDGE STREET	ANYTOWN	0001
* 111	107755	SMITH	DAVE	8306 E FLOYD RD	ANYTOWN	0001
* 103	103329	SMITH	DAVID	37 LANCASTER 1ST	ANYTOWN	0001
* 109	104599	SMITH	DAWN	1111 CTY RTE 35	ANYTOWN	0001
	111058	SMITH	DENISE	2285 HWY 420	ANYTOWN	0001

F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add

Figure 6- 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 customer record you have highlighted.

F5-Will allow you to delete the customer you have highlighted.

NOTE: deleting is only possible with proper security and only if this customer has no ticket history.

F6-Will allow you to add a customer.

Looking up a customer by address

If you wanted to lookup 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 6-4.

Loc	Acct Nbr	Last Name	First Name	Address	DL# Or City	SSAN
* 114	111903	RONER	GAIL	162 BROOKLINE RD	ANYTOWN	0001
	105049	ROSEBOOM	LLOYD	162 DIVISION ST	ANYTOWN	0001
	109174	RODEO	ANNE	162 DIVISION ST	ANYTOWN	0001
* 102	101492	RODRIGUEZ	STEFANIE	162 DIVISION ST.	ANYTOWN	0001
	104871	VANNOSTRAND	TORRI	162 DIVISION STR	ANYTOWN	0001
* 110	107102	TUCKER	DOMONEC	162 G THIRD AVE	ANYTOWN	0001
	103022	SIPF	RENEE	162 GUY PARK	ANYTOWN	0001
	111686	SIPF	RENEE	162 GUY PARK	ANYTOWN	0001
* 109	111345	MILLER	MEAGAN	162 LOWER PARK S	ANYTOWN	0001
* 105	112193	CLARK	CODY	162 MAIN ST APT	ANYTOWN	0001
	104233	SAXBY	RACHEL	162 MAIN ST.	ANYTOWN	0001
	106969	BROWNING	DUSTIN	162 MAIN ST.	ANYTOWN	0001
* 103	103219	NORMANDIN	PATRICIA	162 MOHAWK ST AP	ANYTOWN	0001
* 109	104415	DUDASH	NICK	162 PARK ST	ANYTOWN	0001
* 113	111659	BRINSON	TINA	162 SHARON AVE	ANYTOWN	0001

F1-Next Page F2-Prev Page F3-AR/RTO Hist F4-Chg F5-Delete F6-Add

Figure 6- 4 Customer Maintenance Screen (customers by address)

Looking up a customer by drivers license number

If you wanted to lookup a customer by driver's license number, you would enter a full or partial driver's license number and press the F2 key. Note that if there is no Driver's License in the customer record or if you do not have proper security to even view a driver's license number, the display screen will show City in the customer record.

Looking up a customer by social security number

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. To find an exact match on a social security number, enter the entire social security number with no dashes and press the F3 key. Customers will be displayed in numerical order by the social security search option you have chosen. The social security number will not display in its entirety. T

Looking up a customer by account number

If you wanted to lookup 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 6-5.

Customer Maintenance							02/18/10
Customer Name/#: 103329							
Loc	Acct Nbr	Last Name	First Name	Address	DL# Or City	SSAN	
* 103	103329	SMITH	DAVID	37 LANCASTER 1ST	ANYTOWN	0001	
* 103	103331	ROBINSON	RAYMOND	36 COLUMBIA GARD	ANYTOWN	0001	
* 101	103332	MATTISON	SARA	1028 DIX AVE LOT	ANYTOWN	0001	
	103333	NOREAULT	TABITHA	62 NORTH 4TH ST	ANYTOWN	0001	
* 107	103334	MAIER	BARBARA	37 FAIRVIEW ST	ANYTOWN	0001	
* 104	103335	HENRY	TERRI	251 BELMONT COUR	ANYTOWN	0001	
	103336	BACKUS	JUSTIN	1097 ST HWY 80	ANYTOWN	0001	
	103338	DARROW	TANYA	4 RENAS DR	ANYTOWN	0001	
	103339	LANGEVIN	MEGAN	1045 WASHINGTON	ANYTOWN	0001	
* 103	103340	WEEKS	JOHN	445 BROADWAY	ANYTOWN	0001	
	103341	SCHRIEVER	LORI	96 HAMILTON HOME	ANYTOWN	0001	
* 103	103343	CORRALES	JESSICA	93 CONGRESS ST	ANYTOWN	0001	
* 103	103344	RILEY	SHANNON	150 PAINE ST	ANYTOWN	0001	
* 103	103345	SMITH	TERRI	114 GEORGE ST	ANYTOWN	0001	
* 103	103346	CRANDALL	TRACEY	100 LANCASTER ST	ANYTOWN	0001	

F1-Next Page F2-Prev Page F3-AR/RTD Hist F4-Chg F5-Delete F6-Add

Figure 6- 5 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

This feature requires proper security to be able to change 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 6-6.

Customer Change			02/18/10
Customer/Dr:	SMITH, AMANDA	Acct#:	102405
Company Name:			
Contact Name:			
Address:	123 ABC LANE		
Address Line 2:			
Zip/City/State:	55555-0000 ANYTOWN TX	Map Code:	
Home Phone Nbr:	(555)555-5555	Work Phone Nbr:	(555)555-5555 Ext:
Cell Phone Nbr:	(333)333-3333	Pager Phone Nbr:	
Fax Phone Nbr:		Birth Date:	5/25/1982 Marketing Info
SSAN:	000-00-0001	Drivers License Nbr:	1
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:	1
Customer Type:	L	RTD 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			

F1-References F2-Employer F3-Landlord F4-2nd Cust F6-Comment F7-Car Info

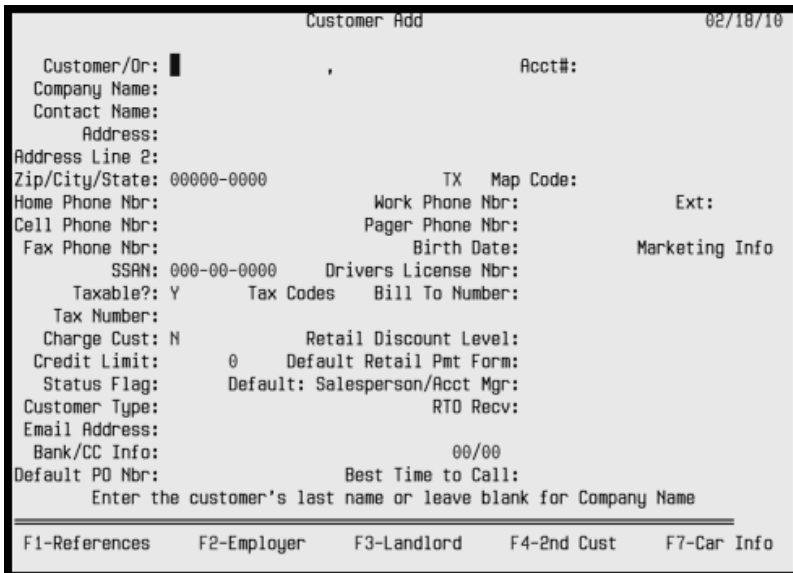
Figure 6- 6 Customer Change Screen

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 6-7. Note: Most customer adds are done while writing up a new agreement.



```

Customer Add                                02/18/10
Customer/Or: |                               Acct#:
Company Name:
Contact Name:
Address:
Address Line 2:
Zip/City/State: 00000-0000          TX Map Code:
Home Phone Nbr:                    Work Phone Nbr:          Ext:
Cell Phone Nbr:                    Pager Phone Nbr:
Fax Phone Nbr:                      Birth Date:          Marketing Info
SSAN: 000-00-0000          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:          RTD Recv:
Email Address:
Bank/CC Info:                                00/00
Default PD Nbr:                    Best Time to Call:
Enter the customer's last name or leave blank for Company Name
-----
F1-References  F2-Employer  F3-Landlord  F4-2nd Cust  F7-Car Info
  
```

Figure 6- 7 Customer Add Screen

CUSTOMER/OR: Enter the customer name, last name first and press the enter key, then enter the first name and press the enter key. Use all capital letters or if this is an institution or a business, go to the next line by pressing enter through the customer name fields.

ACCT#: Press the enter key and the system will automatically assign the next available account number to this customer.

COMPANY NAME: Enter the company name. Note: Use customer name or company name but not both. Press the enter key.

CONTACT NAME: If this is a company account, enter the name of the contact person here.

ADDRESS: Enter their primary address.

ADDRESS 2: Enter additional address information in here.

ZIP/CITY/STATE: Enter the zip code and the city and state will fill in based on zip code. If the city and state do not fill in call or email RSSS support. You can change City and State if necessary; i.e. several cities in this zip code.

HOME PHONE NUMBER: This is a required field. Enter the primary phone number here. If they do not have a home phone number enter 1.

MAP CODE: For Canada. Enter the Canadian postal map code here if applicable.

WORK PHONE NUMBER: This is a required field. Enter the work phone number here. If they do not have a work phone number enter 1.

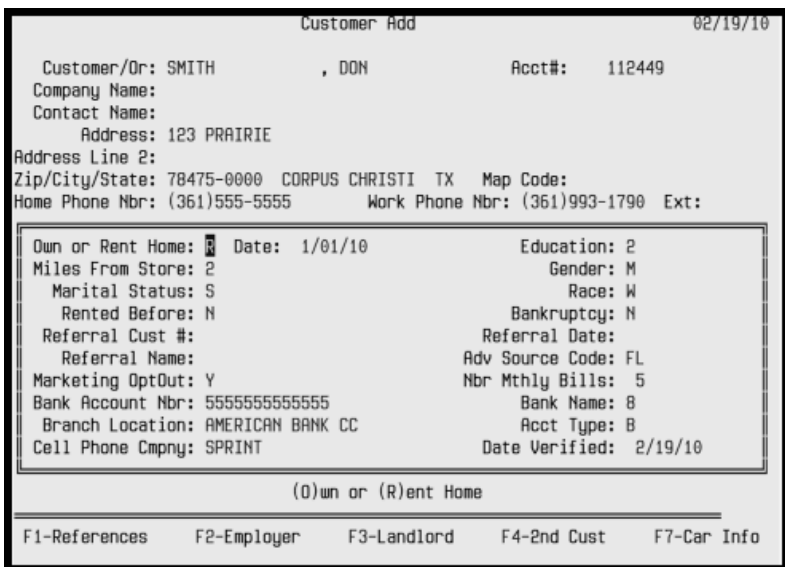
CELL PHONE NUMBER: You may enter a cell phone number here or press enter to proceed to the next field.

PAGER PHONE NUMBER: You may enter a pager phone number here or press enter to proceed to the next field.

FAX PHONE NUMBER: You may enter a fax machine phone number here or press enter to proceed to the next field.

BIRTH DATE: This is a required field. Enter their birth date here. Note format MM/DD/YYYY (See [Customer Reports](#) for the birthday report).

MARKETING INFO If you have this feature, you will be required to gather marketing information from the customer when you are adding a new customer after you enter the birth date, otherwise, you will be taken on to the social security number field. See Figure 6-8.



Customer Add 02/19/10

Customer/Dr: SMITH, DON Acct#: 112449
 Company Name:
 Contact Name:
 Address: 123 PRAIRIE
 Address Line 2:
 Zip/City/State: 78475-0000 CORPUS CHRISTI TX Map Code:
 Home Phone Nbr: (361)555-5555 Work Phone Nbr: (361)993-1790 Ext:

Own or Rent Home: <input checked="" type="radio"/>	Date: 1/01/10	Education: 2
Miles From Store: 2		Gender: M
Marital Status: S		Race: W
Rented Before: N		Bankruptcy: N
Referral Cust #:		Referral Date:
Referral Name:		Adv Source Code: FL
Marketing OptOut: Y		Nbr Mthly Bills: 5
Bank Account Nbr: 555555555555		Bank Name: B
Branch Location: AMERICAN BANK CC		Acct Type: B
Cell Phone Cmpny: SPRINT		Date Verified: 2/19/10

(O)wn or (R)ent Home

F1-References F2-Employer F3-Landlord F4-2nd Cust F7-Car Info

Figure 6- 8 Adding Marketing Information Window

- OWN OR RENT HOME** (O)wn or (R)ent Home
- DATE** Date Moved Into Current Address
- EDUCATION** 1) High School 2) Some College 3) Trade School 4) College Graduate
- MILES FROM STORE** 1) Less Than One 2) 2-3 3) 3-5 4) Over 5
- GENDER** (F)emale or (M)ale
- MARITAL STATUS** (S)ingle, (M)arried, (D)ivorced, or (W)idow

- RACE** (A)sian, (B)lack, (H)ispanic, (O)ther, or (W)hite
- RENTED BEFORE** Rented From Another Company? (Y)es or (N)o
- BANKRUPTCY** Filed Bankruptcy? (Y)es or (N)o
- REFERRAL CUST** If Referred By Someone, Enter Their Name and a window will pop up for you to select the referral customer from.
- REFERRAL DATE** The date the customer was referred
- ADV SOURCE CODE** How Did You Hear About Us? (?? To Display Selection Window for choices)
Customer Wants to Opt-out of Receiving Marketing Info? (Y)es or (N)o
- NBR MTHLY BILLS** Number of Bills the Customer Pays Monthly
- BANK ACCOUNT NBR** Bank Account Number
- BANK NAME** Bank: 1) Bank of America 2) JPMorgan/Chase 3) Wells Fargo 4) US Bank 5) WAMU 6) Wachovia 7) Countrywide 8) Other
- BANK BRANCH LOCATION** Bank Branch Location
- ACCT TYPE** Bank Account Type (C)hecking (S)avings or (B)oth
- CELL PHONE COMPANY** Type in the cell phone company name the customer uses.
- DATE VERIFIED** Last date the customer's information was verified.

SSAN: This is the social security number field. This is required and protected by security settings. If you do not require a social security number enter a 1 here.

DRIVERS LICENSE NBR: This is a required field and protected by security settings. If you do not require a driver's license number enter a 1 here. 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.

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 on the bottom of the screen: Social Security Number or Driver's License Number already on File; Continue: N, see Figure 6-9.

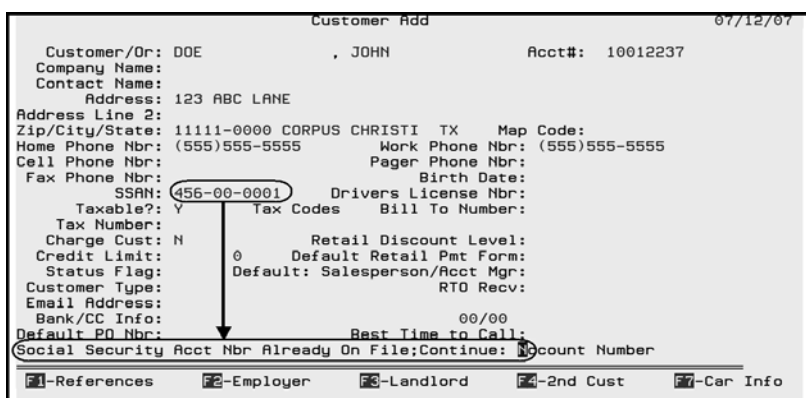


Figure 6- 9 Customer Add Screen SSN already on file message

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 which customer already has this number.

TAXABLE If this account is taxable, enter a Y for yes. If this account is tax exempt, enter an N.



Lookup/Change/Add Customer Data - RCUSTMNT

TAX CODES Enter to accept the default. If you have a unique tax situation, consult with your company management or ask an application support specialist at RSSS. 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, ABC Company purchase orders are paid by Jones ABC Enterprises, Inc. so you would enter ABC Enterprises, Inc. account number here.

TAX NUMBER If you answered N to the Taxable field above, enter the Federal Tax Id number here. If you do not know the federal id number, enter a 1 here. If the account is taxable leave this field blank.

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 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 this customer to charge, enter the credit limit here. NOTE: Proper security is required. A zero here indicates the customer has an unlimited credit limit. If you are using the Sales AR system and have a revolving payment form, you may set up the credit limit here.

DEFAULT RETAIL PMT FORM To ensure an customer, institution or business charges always go to the correct payment form for retail sales you may enter it as a default here, or accept the blank default and enter to the next field.

STATUS FLAG This is a two-character free form field. Information entered here will not appear on any report.

DEFAULT SALESPERSON/ACCT MGR Entering a salesperson number in this field will populate this salesperson field on all new rentals and sale transactions and agreements for this customer as a default. Entering an account manager number in the next field will also populate all future rental and sales transactions with this number as a default in the account manager fields.



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 a 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. If you plan to use this feature, consult with RSSS support to assess what additional programming may be necessary. Proper security is required to access and view this field.

CREDIT CARD TYPES:

VS = Visa

MC = Mastercard

DI = Discover

AM = American Express

OT = Other

DB = Bank Draft

DEFAULT PO NBR You may enter an open purchase order number for this account's future sales accounts receivable (AR) invoice (ticket). Enter the word "HOLD" to prevent any billing on this account until a purchase order number is added to the individual AR invoice (ticket).

BEST TIME TO CALL: Enter the best time to contact this customer by phone.

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-References key to add references on this account. You will see a screen similar to Figure 6-10. 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/Or: SMITH	Name: DOUGH, JANE
Company Name:	Add: 127 ABC STREET
Contact Name:	Add2:
Address: 123 PRAIRIE	City: CORPUS CHRISTI TX 11111-
Address Line 2:	Ph: (333)333-3333 Map Code:
Zip/City/State: 78475-0000	Rel: NEIGHBOR
Home Phone Nbr: (361)555-555	Name:
Cell Phone Nbr: (361)444-444	Add:
Fax Phone Nbr:	Add2:
SSAN: 000-00-0001	City: TX 00000-
Taxable?: Y Tax	Ph: Map Code:
Tax Number:	Rel:
Charge Cust: N	Name:
Credit Limit: 0	Add:
Status Flag: Defaul	Add2:
Customer Type: L	City: TX 00000-
Email Address:	Ph: Map Code:
Bank/CC Info:	Rel:
Default PO Nbr:	

Last name for this reference

F8-Backout F9-Second Page F10-Exit ENTER-Next Field

Figure 6-10 Adding a Reference Window

F2 - Adding an employer

Press the F2-Employer key and you will be able to add their employer information, see Figure 6-11. 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/Or: SMITH	, DON	Acct#: 112449
Company Name:		
Contact Name:		
Address: 123	Work Information	
Address Line 2:		
Zip/City/State: 7847	Company: XYZ CORPORATION	
Home Phone Nbr: (361	Add: XYZ BLVD	
Cell Phone Nbr: (361	Add2: STE 1111	
Fax Phone Nbr:	City: CORPUS CHRISTI TX 11111-	
SSAN: 000-	Map Code:	
Taxable?: Y	PayDays: FRIDAY	Frequency: B
Tax Number:	Income: 2,500.00	Full/Part Time: F
Charge Cust: N	Shift: 8-5	Date Employed: 8/02/06
Credit Limit:	Position: SHIPPING CLERK	
Status Flag:	Supervisor: SAKS	
Customer Type: L	Comment:	
Email Address:		
Bank/CC Info:		
Default PO Nbr:		
Miscellaneous notes(department,supervisor,extension,etc.)		

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

Figure 6-11 Adding an Employer Window

F3 - Adding a landlord

Press the F3-Landlord 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 6-12. This information will now show up on the contact list in the enhanced collections (optional) module.

```

Customer Add                                02/19/10
Customer/Dr: SMITH          , DON          Acct#: 112449
Company Name:
Contact Name:
Address: 123 P
Address Line 2:
Zip/City/State: 78475
Home Phone Nbr: (361)
Cell Phone Nbr: (361)
Fax Phone Nbr:
SSAN: 000-0
Taxable?: Y
Tax Number:
Charge Cust: N
Credit Limit:
Status Flag:
Customer Type: L
Email Address:
Bank/CC Info:
Default PO Nbr:

Landlord Information
Apt:
Mgr:
Or Landlord's Name
Name: BAKER          , MARY
Monthly Pmt: 600.00
Mortgage Co: NONE
Add: 129 PRAIRIE
Add2:
City: CORPUS CHRISTI TX 11111-
Ph: (361)777-7777 Map Code: █

Best Time to Call:
Landlord's map codes

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

Figure 6-12 Adding a Landlord Window

F4 - Adding a second customer

Press the F4-2nd Cust key and you will be able to add spouse, roommate, co-applicant information and their mailing address, if required. See Figure 6-13.

```

Customer Change                                03/30/10
Customer/Dr: SMITH          , LORETTA     Acct#: 4040673
Company Name:
Contact Name:
Address: 1625 W
Address Line 2:
Zip/City/State: 55555-
Home Phone Nbr: (555)5
Cell Phone Nbr:
Fax Phone Nbr:
SSAN: 000-00
Taxable?: Y
Tax Number:
Charge Cust:
Credit Limit:
Status Flag:
Customer Type: 0
Email Address:
Bank/CC Info:
Default PO Nbr:

Customer Mailing Address
Add: 123 PRAIRIE
Add2:
City: ANYTOWN          TX 55555-1234

Second Customer Info
Name: SMITH          , FARLEY
Add: 123 PRAIRIE
Add2:
City: ANYTOWN          TX 55555-1234
Ph: (361)555-5555      Map Code:
W Ph: (614)444-4444 Ext: DOB: 3/11/1936
SSAN 000-00-0001 DL#: 1
Rel: BROTHER █

Relationship to the first customer

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

Figure 6-13 Adding a Second Customer Window

F6 - Adding a comment

Press the F6-Comment key and you will be able to add comments to this customer's record. See Figure 6-14.

```

Customer Change                                02/19/10
Customer/Dr: SMITH      , DON      Acct#:  112449
Company Name:
Contact Name:
Address: 123 PRAIRIE
Address Line 2:
Zip/City/State: 78475-0000 CORPUS CHRISTI TX  Map Code:
Home Phone Nbr: (361)555-5555      Work Phone Nbr: (361)993-1790  Ext:
Cell Phone Nbr: (361)444-4444      Pager Phone Nbr:
Fax Phone Nbr:                      Birth Date:      Marketing Info

THIS IS THE COMMENT BOX YOU CAN ENTER COMMENTS IN ABOUT THIS CUSTOMER.
YOU CAN ADD UP TO 50 LINES OF COMMENTS.  THESE COMMENTS WILL ONLY
DISPLAY IN THE CUSTOMER SCREEN AREA UNDER F6-COMMENT KEY AND ARE
AVAILABLE IN ONSCREEN COLLECTIONS (TICKDUE) MODULE UNDER REFERENCE
INFORMATION.

Enter Comment, and press F9 when done
Enter the customer's last name or leave blank for Company Name

F1-Fword F2-Back F9-Done F10-Abort HOME-Top PG DN-Del Line PG UP-Ins Line
  
```

Figure 6-14 Adding Customer Comments Window

You may enter any comments about the customer 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-Car Info key and you will be able to add information on the customer's vehicle, if required. See Figure 6-15. You may enter information for two different vehicles.

```

Customer Change                                02/19/10
Customer/Dr: SMITH      , DON      Acct#:  112449
Company Name:
Contact Name:
Address: 123 PR
Address Line 2:
Zip/City/State: 78475-
Home Phone Nbr: (361)5
Cell Phone Nbr: (361)4
Fax Phone Nbr:
SSAN: 000-00
Taxable?: Y
Tax Number:
Charge Cust: N
Credit Limit:
Status Flag:
Customer Type: L
Email Address:
Bank/CC Info:
Default PO Nbr:

Car Information
License: 123ABC
VIN Nbr: A124560CF0034IDM999999
Year: 2000
Make: FORD
Model: MUSTANG
Desc: RED GT

Lien: NONE
Phone #:
Pmt Amt:      per
Purchase Date: █

Best Time to Call:
Date Purchased

F8-Backout      F9-Second Page      F10-Exit      ENTER-Next Field
  
```

Figure 6-15 Adding Car Information Window

Once the information has been entered, the prompt "Any More Changes:" will be displayed, see Figure 6-16.

```

Customer Change                                02/19/10

Customer/Dr: SMITH      , DON      Acct#: 112449
Company Name:
Contact Name:
Address: 123 PRAIRIE
Address Line 2:
Zip/City/State: 78475-0000 CORPUS CHRISTI TX Map Code:
Home Phone Nbr: (361)555-5555      Work Phone Nbr: (361)993-1790 Ext:
Cell Phone Nbr: (361)444-4444      Pager Phone Nbr:
Fax Phone Nbr:                      Birth Date:           Marketing Info
SSAN: 000-00-0001      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: 26
Status Flag:           Default: Salesperson/Acct Mgr: 1
Customer Type: L           RTD Recv:
Email Address:
Bank/CC Info: MC 2222222222222222222222222222 02/13
Default PD Nbr:           Best Time to Call:
Any More Changes: 

-----
F1-References F2-Employer F3-Landlord F4-2nd Cust F6-Comment F7-Car Info

```

Figure 6-16 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 6-2.