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## Creating a Customer Mailing List

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Customer List
=====
8007226374
Customer Discount Level: A
pca customer

1 Blue Hill Plaza
Pearl River ny 10965

Ship To:
Awesome Friend

2 Route 6
Mahopac NY 10541
-----
8459200880
Customer Discount Level: A
Happy Customer

1 Locust Ave
Oxford OH 45056

Ship To:

-----
```

To print a customer mailing list the following must be configured:

- [Customer Accounts Must be created in Customer Maintenance](#)
- [A Report Printer must be configured in Friendly Printer Setup](#)
- [Running the Report that Displays Mailing Information](#)

## Adding your Customers with all Required Information

**Manager**

**Options**

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Customer Maintenance**.

The screenshot shows the 'Customer Maintenance' window. At the top, there are tabs for 'This Customer', 'All Customers', and 'Print Customer Labels'. Below this is a header 'Information for: pca customer' with a 'Keyboard' button. The form contains several input fields: Customer # (8007226374), First Name (pca), Last Name (customer), and E-mail Address. Below these are tabs for 'General Info', 'Extended Info', 'Account Info', 'Shipping/Billing', 'History', 'Notes', and 'Stores'. The 'General Info' tab is active, showing fields for Company Name, Street Address (1 Blue Hill Plaza), Street Address 2, State (ny), Zip Code (10965), Primary Phone #, Alternate Phone #, City (Pearl River), County (Rockland), Bonus Points Achieved (0), Birthday, Application Date (8/31/2011), Card Swipe IDs (Add/Del buttons), Discount Percentage (0.00%), Discount Level (A), and Loyalty Plan (NONE). There are also checkboxes for 'Charge At Cost', 'Tax Exempt', and 'Print Notes on Receipt'. At the bottom, there is a search field, navigation buttons (Previous, Look up, Next), and action buttons (Add, Update, Delete, Exit). A status bar at the bottom right indicates 'Last Search Returned 1 Customer'.

4. At the **Customer Maintenance** screen select **Add**.
5. Enter the following required information:
  - **Customer Number** (tip: Use the phone number as the customer number for easy reference).
  - **First Name.**
  - **Last Name.**
  - **Street Address.**
  - **City.**
  - **State.**
  - **Zip Code.**

Customer Maintenance

This Customer All Customers Print Customer Labels

**Information for: pca customer** Keyboard

Customer # 8007226374 First Name **pca** Last Name **customer** E-mail Address

General Info Extended Info Account Info **Shipping/Billing** History Notes Stores

**Shipping**

First Name Last Name  
**Awesome** **Friend**

Company Name Phone Number

Street Address City  
**2 Route 6** **Mahopac**

Extended Address State  
**NY**

Zip Code Country  
**10541**

**Billing**

Bill To

Primary Contact

Secondary Contact

Terms

Resale Number

Search by Customer #

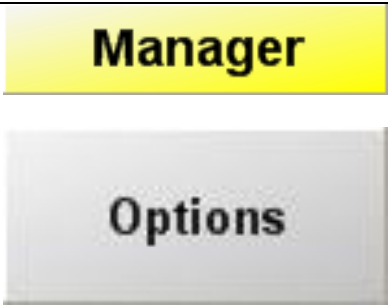
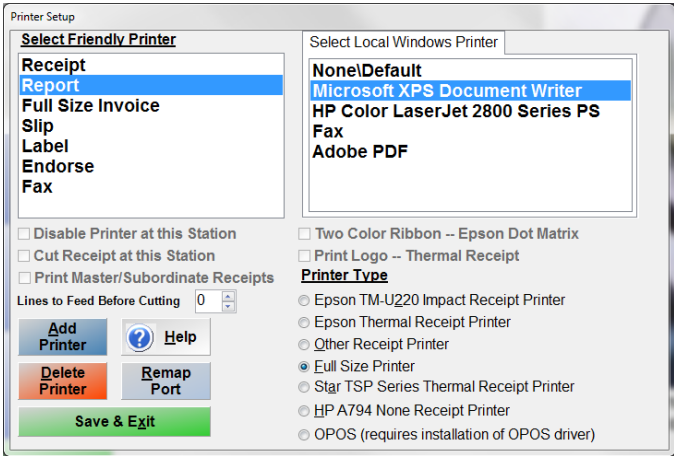
Last Search Returned 3 Customers

6. If there is a shipping address which is different from the address entered under the **General Info** tab, select the **Shipping/Billing** tab and enter any other address here.

7. When done select **Save/Update** then select **Exit**.

This process will need to be repeated for all of your customers.

## Configuring a Report Printer in Friendly Printer Setup

 <p>The image shows two buttons: a yellow button labeled "Manager" and a grey button labeled "Options".</p>	<ol style="list-style-type: none"><li>1. Select the <b>Manager</b> or <b>Options</b> button.</li><li>2. Enter the administrator password (default: admin) where applicable.</li><li>3. Select <b>Setup</b> then, <b>Friendly Printer Setup</b>.</li></ol>
 <p>The image shows the "Printer Setup" dialog box. It has two panes: "Select Friendly Printer" and "Select Local Windows Printer".</p> <p><b>Select Friendly Printer:</b> Receipt, Report (selected), Full Size Invoice, Slip, Label, Endorse, Fax.</p> <p><b>Select Local Windows Printer:</b> None\Default, Microsoft XPS Document Writer (selected), HP Color LaserJet 2800 Series PS, Fax, Adobe PDF.</p> <p><b>Printer Type:</b> Full Size Printer (selected), Other Receipt Printer, Epson Thermal Receipt Printer, Epson TM-U220 Impact Receipt Printer, Star TSP Series Thermal Receipt Printer, HP A794 None Receipt Printer, OPOS (requires installation of OPOS driver).</p> <p>Buttons: Add Printer, Delete Printer, Remap Port, Save &amp; Exit, Help.</p>	<ol style="list-style-type: none"><li>4. Select <b>Report</b> in the <b>Select Friendly Printer</b> list on the left.</li><li>5. Select the full size printer that you would like to print the report to, in the <b>Select local Windows printer</b> list on the right.</li></ol> <p>If you would like to save the list to a file then select one of the local windows printers listed below:</p> <ul style="list-style-type: none"><li>• Microsoft XPS Document Writer</li><li>• Adobe PDF creator (if it is listed)</li></ul> <p>If one of these is selected, you will be prompted to save the file after selecting print in the reporting window.</p> <ol style="list-style-type: none"><li>6. Select <b>Full Size Printer</b> as the Printer Type.</li><li>7. Select <b>Save &amp; Exit</b>.</li></ol>

## Printing the Ship To Info Report

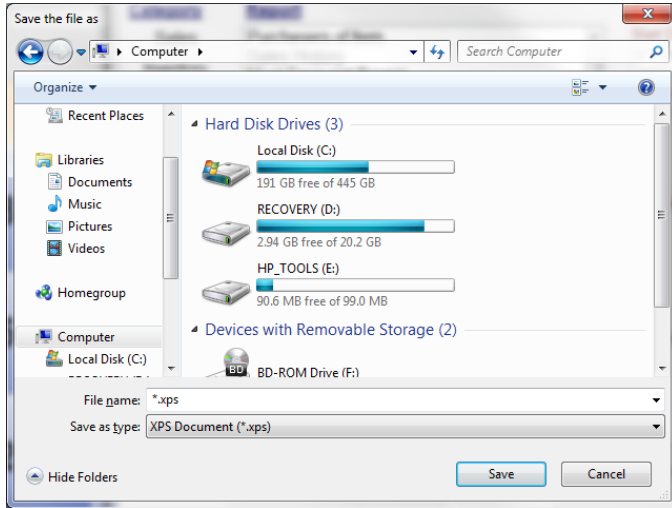
**Manager**

**Options**

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Reporting**.

The screenshot shows the 'Reporting' application window. On the left is a 'Category' tree with 'Customer' selected. The 'Report' dropdown is set to 'Ship To Info'. The 'Date/Time Range' section shows 'Start Date' as 8/31/2011 and 'End Date' as 8/31/2011. Under 'Criteria', 'Select Cashier' is set to 'ALL', 'Select Department' is 'NONE', 'Select Station' is '01', and 'Select Store ID' is '1001'. There are also fields for 'Select Vendor' (set to 'ALL'), 'Select Category' (set to 'ALL'), and 'Select Matrix Group' (set to 'ALL'). At the bottom, there are 'Display', 'Print', and 'Exit' buttons, along with 'Select Item', 'Clear', and 'Select Customer' buttons.

4. Under **Category** select **Customer**.
5. Under **Report** select **Ship To Info**.
6. Select **Print**.
7. Select **Exit**.



8. If prompted select the location to save the file, enter a **File Name** and select **Save**.

```
=====
Customer List
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pca customer

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Pearl River ny 10965

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Ship To:
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This is an example of the Ship To Info report.