


Customer Maintenance Screen



Customer Maintenance
 This Customer All Customers Print Customer Labels

Information for: Cash Customer Keyboard

Customer # 101 First Name Cash Last Name Customer E-mail Address

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

Company Name Primary Phone # Bonus Points Achieved 0

Street Address Alternate Phone # Birthday

Street Address 2 City Application Date 7/16/2010

State Zip Code County Card Swipe IDs Add Del

Discount Percentage 0.00% Price Level A **Loyalty Plan: NONE**

Charge At Cost Tax Exempt Print Notes on Receipt

Search by Customer #

Previous Look up Next Last Search Returned 1 Customer Add Delete Update Exit

You can use Customer Maintenance to keep track of customer information as well as allow your customers to open an account with you.

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- [Customer Information Tabs](#)
- [How Do I...?](#)

Description

The **Customer Maintenance** screen displays one customer's information at a time. The top of the screen displays required information for the current customer. To navigate between customers, use the arrows on the bottom left of the screen. To Add, Update, Delete and Exit, use the buttons on the bottom right of the screen (explained in the [Screen Breakdown](#) section).

- You can track all, some or none of your customers depending on your needs and preferences. If you are tracking your customers you will be able to see every sale that customer has made since they have opened the account along with other helpful info.

The **Customer Maintenance** screen can be used to configure the following types of customers:

- **Standard:** Selecting this option will give the customer the ability to perform regular sales as well as on account sales. In order for a customer to do on account sales an [Open Account Date](#) must first be configured.
- **Layaway:** Selecting this option will give the customer the ability to perform regular sales as well as do Layaway sales. In order for a customer to do Layaway sales the layaway options must first be configured.

For information on configuring and using layaway please see the following document:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Using_Layaway.pdf

The customer maintenance screen is controlled by the employee permissions so you can determine which of your employees have access to it. You can also control the functions they are allowed to do within the customer maintenance screen through the permissions.

For more information on configuring employee permissions please see the following document:

- <http://faq.pcamerica.com/software/employees/employee-permission-explanations>

Please note that CRE\RPE comes with a default customer (101 – Cash Customer), this customer cannot be deleted.

Screen Breakdown

<table border="1"> <tr> <td style="background-color: #4F81BD; color: white;">This Customer</td> <td style="background-color: #E6E6E6;">All Customers</td> <td style="background-color: #E6E6E6;">Print Customer Labels</td> </tr> <tr> <td>Accounts Receivable</td> <td></td> <td>Ctrl+A</td> </tr> <tr> <td>Change customer #</td> <td></td> <td></td> </tr> <tr> <td>Apply Finance Charges to current customer</td> <td></td> <td></td> </tr> <tr> <td>Gift Registry</td> <td></td> <td>Ctrl+R</td> </tr> </table>	This Customer	All Customers	Print Customer Labels	Accounts Receivable		Ctrl+A	Change customer #			Apply Finance Charges to current customer			Gift Registry		Ctrl+R	<ul style="list-style-type: none"> • This Customer - Will allow you to make changes or access features for the current customer you are on. <ul style="list-style-type: none"> ○ Accounts Receivable - This will take you directly to the accounts receivable screen, Details about the account receivable screen are below. ○ Change Customer # - For any reason if you need to change the customer number you assigned a customer this is the feature you will use to change it. When connected to a web portal this option will not be available. ○ Apply Finance Charges to Current Customer - You can apply a finance charge to a customer if they do not pay off a on account transaction within a certain number of days that you assign. ○ Gift Registry - The gift registry feature allows you to keep a 'wish list' for each customer. If you have customers that are soon to be married (bridal registry), people with upcoming birthdays, people about to move (housewarming registry) or others who may be expecting gifts, the Gift Registry is the place to set them up. Offering this service to your customers will result in their friends coming to you to buy those gifts.
This Customer	All Customers	Print Customer Labels														
Accounts Receivable		Ctrl+A														
Change customer #																
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Gift Registry		Ctrl+R														
<table border="1"> <tr> <td style="background-color: #4F81BD; color: white;">All Customers</td> <td style="background-color: #E6E6E6;">Print Customer Labels</td> </tr> <tr> <td>Apply Finance charges to all overdue balances</td> <td></td> </tr> <tr> <td>Recalculate Customer Balances</td> <td></td> </tr> <tr> <td>Recalculate Customer Bonus Points</td> <td></td> </tr> </table>	All Customers	Print Customer Labels	Apply Finance charges to all overdue balances		Recalculate Customer Balances		Recalculate Customer Bonus Points		<ul style="list-style-type: none"> • All Customers - Allows you to do certain features that will affect all of your customers. <ul style="list-style-type: none"> ○ Apply Finance Charges to all Overdue Balances - This will apply a finance charge to all customers if they do not pay off an on account transaction within a certain number of days that you assign. You will be prompted to enter how many days old an invoice must be in order to receive a finance charge and the percentage to apply. ○ Recalculate Customer Balances - This will recalculate all of your customer's balances by going through all invoices that have been put on account including all payments made to the account and adding them up to get the balance. This function should only be run if erroneous payments have been applied. ○ Recalculate Customer Bonus Points - This will recalculate all of your customers earned bonus points, by going through all the invoices and then calculating the achieved bonus points. 							
All Customers	Print Customer Labels															
Apply Finance charges to all overdue balances																
Recalculate Customer Balances																
Recalculate Customer Bonus Points																

Print Customer Labels

Current Customer	Ctrl+L
All Customers	Ctrl+C
Bonus Point Range	Ctrl+B
Event Range	Ctrl+E
Membership Expiration Range	

- **Print Customer Labels** - Allows you to print labels for a customer on a label printer. Each label displays the customer name, address, city, state, and zip code. Optionally you can have a barcode print with the customer number.

You can choose how the labels are printed from the options below:

- **Current Customer:** Use this option to print a label for the current customer.
- **All Customers:** Use this option to print labels for all customers. .
- **Bonus Point Range:** Use this option to print a label for all customers who satisfy a specified bonus range.
 - You will be prompted to enter the lower and upper limits for the bonus point range.
- **Event Range:** Use this option to print a label for all customers who satisfy a specified event date and description.
 - You will be prompted to enter an event description and the upper and lower limits for the event date range.
 - To include all event descriptions in your range, enter " * " for the event description.
- **Membership Expiration Range:** Use this option to print a label for all customers whose membership expires within a specified date range.
 - You will be prompted to enter the start and end date.

Note: Printing Customer Labels Requires that a Barcode Label Printer is installed. To fit all of the information on the Labels requires the use of Paper Labels or Shelf Tags.

Keyboard

- **Keyboard** - Selecting this button will display the on screen keyboard. This is used by selecting the field you would like to enter text into and then selecting the Keyboard button where you will be able to type the information in, on screen.


Customer #
8007226374





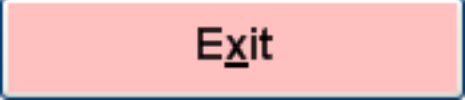
- **Customer # (Required):** This is the **unique** identifier for a customer. Every customer **MUST** have a customer number.

Customer numbers can be up to 10 digits long and can contain any alphanumeric characters. You will be able to search by the customer # on the [Customer Lookup Window](#)

Customer #101 is the default cash customer and cannot be changed.

It is recommended to use the customer's phone number rather than a random number so it is easier for them to remember when they come in again.

<p>First Name</p> <p>PCA</p>	<ul style="list-style-type: none"> • First Name (Required): Enter the customers first name here.
<p>Last Name</p> <p>Customer</p>	<ul style="list-style-type: none"> • Last Name (Required): Enter the customers last name here. You will be able to search by company name on the Customer Lookup Window
<p>E-mail Address</p> <p>tech@pcamerica.com</p>	<ul style="list-style-type: none"> • E-mail Address: Enter the customers e-mail address here. <p>The Email address entered here is used with the following features:</p> <ul style="list-style-type: none"> • Mass Email Feature - This is for sending your customers an email. Please see the following document for more information: <ul style="list-style-type: none"> ○ http://faq.pcamerica.com/file-lockers/pdf-locker/Mass_Email.pdf • Prompt Media - This is for emailing the customer a copy of the receipt. <ul style="list-style-type: none"> ○ http://faq.pcamerica.com/file-lockers/pdf-locker/Email_Customer_Receipt.pdf
<p><u>S</u>earch by Customer #</p>	<ul style="list-style-type: none"> • Search by Customer #: Here you can enter the customer number and then the customer will be brought up to the screen.
 <p>Two buttons: 'Previous' with a left-pointing arrow and 'Next' with a right-pointing arrow.</p>	<ul style="list-style-type: none"> • Use the Previous and Next buttons to cycle through the customer that is being displayed.

	<ul style="list-style-type: none"> • Look up: This button will bring you to the Customer Lookup Window.
<p>Last Search Returned 2 Customers</p>	<ul style="list-style-type: none"> • This will display the result of the last search results from the Customer Lookup Window.
	<ul style="list-style-type: none"> • Add: This button will allow you to create new Customers in your database.
	<ul style="list-style-type: none"> • Update: This button will save any changes made to the customer.
	<ul style="list-style-type: none"> • Delete: This button will delete the customer from the database.
	<ul style="list-style-type: none"> • Exit: This button will Exit from the customer maintenance screen.

Gift Registry

Registry of Pca Customer
Registry ID: 123

Item #	Description	# Requested	# Purchased
Test	Test Item	1	0

Description of Registry
Wedding

Quick Help Add Item Delete Print Exit

The gift registry feature allows you to keep a 'wish list' for each customer. If you have customers that are soon to be married couples (bridal registry), people with upcoming birthdays, people about to move (housewarming registry) or others who may be expecting gifts, the Gift Registry is the place to set them up.




Offering this service to your customers will result in their friends coming to you to buy those gifts.

When a customer purchases an item on a gift registry, highlight the item on the CRE Invoice Screen and select Apply to Registry from the Tools menu.

You will be prompted to enter the [Registry ID](#) number to which this item should be applied.

Gift Registry - Screen Breakdown

<p style="text-align: center;">Registry ID: 123</p>	<ul style="list-style-type: none"> • Registry ID: This is the ID for the Gift Registry. The cashier will be asked for this number when selling an item on an invoice for a gift registry. <p>This number is also the customer number for the customer who has the gift registry.</p>								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Item #</th> <th style="width: 55%;">Description</th> <th style="width: 15%;"># Requested</th> <th style="width: 15%;"># Purchased</th> </tr> </thead> <tbody> <tr> <td>Test</td> <td>Test Item</td> <td style="text-align: center;">1</td> <td style="text-align: center;">0</td> </tr> </tbody> </table>		Item #	Description	# Requested	# Purchased	Test	Test Item	1	0
Item #	Description	# Requested	# Purchased						
Test	Test Item	1	0						
<p>Each item that the registrant has on their registry consists of the item # and description, the # requested (how many of this item they'd like) and the # purchased (how many of this item has been purchased so far).</p>									
<p style="text-align: center;">Description of Registry</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;">Wedding</div>	<ul style="list-style-type: none"> • Description of Registry: Here you will enter the description or reason for the registry (i.e. Wedding, Birthday Registry, etc...). 								
<p style="text-align: center;">Quick Help</p>	<ul style="list-style-type: none"> • Quick Help: This button will bring up a Quick Help section which describes the functions of this screen. 								
<p style="text-align: center;">Add Item</p>	<ul style="list-style-type: none"> • Add Item: This button will allow you to add items to the gift registry. After selecting Add Item you will be prompted for the item number of the desired item. You will then be prompted to enter a desired quantity for the item. 								

	<ul style="list-style-type: none"> • Print: This button will allow you to view a printable copy of the selected customer’s gift registry. After selecting the Print button a copy of the registry will print to the screen. The gift registry can then be printed to the report printer, after the printer icon has been selected. <p>For information on configuring the report printer please see the following document:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Friendly_Printer_Setup.pdf
	<ul style="list-style-type: none"> • Delete: This button will allow you to remove an item from the registry, select the item to be removed on the grid and then select Delete.
	<ul style="list-style-type: none"> • Exit: This button will exit from the Gift Registry window, returning to the Customer Maintenance screen.

Customer Lookup Window

The screenshot shows a window titled "Select Customer" with a table of customer information. Below the table is a search input field and a virtual keyboard interface.

Customer#	First Name	Last Name	Address	Company	Phone #	Zip Code
101	Cash	Customer				
123	Pca	Customer				
456	Test	Customer				

Type customer #, last name, company, phone #

Change Sort Order: BackSpace

Virtual Keyboard:

- Row 1: 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, -, Scroll Up
- Row 2: Q, W, E, R, T, Y, U, I, O, P, Search
- Row 3: A, S, D, F, G, H, J, K, L, Exit
- Row 4: Z, X, C, V, B, N, M, Space, Select







The Lookup Customer window allows you to search through your existing customer base in order to find specific customers you would like to edit.

This screen displays the following important information:

- The Customer number
- The Customers first name
- The Customers last name
- The Customers address
- The Customers company
- The Customers phone number
- The Customers zip code

The information on this screen can be sorted by selecting the column header for what you would like to sort the information by.

Customer Lookup Window - Screen Breakdown

	<ul style="list-style-type: none"> Using the on screen keyboard (or the physical keyboard at your location) enter information based on the following criteria to search by: <ul style="list-style-type: none"> Customer # Last Name Company Phone #
	<ul style="list-style-type: none"> Change Sort Order: This button allows you to change which of the above criteria will be used to search by. You can search for each term individually or by all at the same time.
	<ul style="list-style-type: none"> Search: This button will return results from your customers based on the criteria entered.
	<ul style="list-style-type: none"> Scroll Up and Scroll Down: These buttons will change which customer is selected in the list.
	<ul style="list-style-type: none"> Select: This button will select the highlighted customer in the list. This will allow you to edit the customer options on the Customer Maintenance screen.
	<ul style="list-style-type: none"> Exit: This button will exit from the Customer Lookup window, returning to the Customer Maintenance screen.

Customer Information Tabs

There are seven tabs of information that can be configured in Customer Maintenance.

- [General Info](#) - This is the screen where you will add the customer's personal info.
- [Extended Info](#) - You can keep track of more detailed info about the customer here, i.e.: credit card info, etc...
- [Account Info](#) - This is the screen that you will use to keep track of the customer's account info.
 - [Detailed Account Info](#) - This is the screen that shows a history of all invoices and payments made to the account; also this is the screen that you will make the account payments and give store credit to the customers.
- [Shipping/Billing](#) - Shipping and Billing information will be entered here.
- [History](#) - Will show each transaction that the customer has made since you started tracking them on invoices.
- [Notes](#) - Any special notes about a customer can be entered here.
- [Stores](#) - This is where a customer can be associated with specific stores.

General Info tab

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 tech@pcamerica.com

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

Company Name pcAmerica Primary Phone # (800) 722-6374 Bonus Points Achieved 0
 Street Address 1 Blue Hill Plaza 2nd Floor Alternate Phone # Birthday
 Street Address 2 City Pearl River Application Date 1/11/2012
 State NY Zip Code 10965 County Rockland Card Swipe IDs
 Discount Percentage 0.00% Discount Level A Loyalty Plan: NONE
 Charge At Cost Tax Exempt Print Notes on Receipt

Search by Customer #
 Add Delete
 Previous Look up Next Last Search Returned 2 Customers
 Update Exit

General Info tab - Screen Breakdown

<p>Company Name</p> <p>pcAmerica</p>	<ul style="list-style-type: none"> Company Name: Here is where the company name for the customer is entered. You will be able to search by company name on the Customer Lookup Window
<p>Street Address</p> <p>1 Blue Hill Plaza 2nd Floor</p> <p>Street Address 2</p>	<ul style="list-style-type: none"> Street Address: Here is where the first line of the address for the customer is entered. Street Address 2: Here is where the second line of the address for the customer is entered.
<p>State</p> <p>NY</p>	<ul style="list-style-type: none"> State: Here is where the state that the customer lives in is entered.
<p>Zip Code</p> <p>10965</p>	<ul style="list-style-type: none"> Zip Code: Here is where the zip code that the customer lives in is entered.

<p style="text-align: center;">Discount Percentage</p> <p style="text-align: center;">0.00%</p>	<ul style="list-style-type: none"> • Discount Percentage: Here is where a percentage can be entered that the customer will get discounted on invoices, when the customer has been selected for them. The percentage entered here will be displayed on the invoice screen as well as printed on the receipt.
<p style="text-align: center;">Price Level</p> <p style="text-align: center;">A</p>	<ul style="list-style-type: none"> • Price Level: Here is where the Inventory Price Level can be selected for the customer. <ul style="list-style-type: none"> ○ Inventory Price Levels will take precedence over Price Levels configured in the Price Levels Screen. <p>For more information on configuring Price Levels please see below:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Price_Levels.pdf
<p style="text-align: center;"><input type="checkbox"/> Charge At Cost</p>	<ul style="list-style-type: none"> • Charge At Cost: You can select to charge your customers at the Cost of your inventory instead of the Price you Charge.
<p style="text-align: center;"><input type="checkbox"/> Tax Exempt</p>	<ul style="list-style-type: none"> • Tax Exempt: You can select to not charge any assigned tax for customers on inventory where Tax Rates are configured. <p>For more information on configuring tax rates please see:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Tax_Rates_Screen.pdf

<p>Primary Phone #</p> <p>(800) 722-6374</p> <p>Alternate Phone #</p>	<ul style="list-style-type: none"> • Primary Phone #: Here is where you will enter the customer's main phone number. You will be able to search by the primary phone number on the Customer Lookup Window • Alternate Phone #: Here you can enter the customers work number or any other alternate phone number.
<p>City</p> <p>Pearl River</p>	<ul style="list-style-type: none"> • City: Here is where the city that the customer lives in is entered.
<p>County</p> <p>Rockland</p>	<ul style="list-style-type: none"> • County: Here is where the county that the customer lives in is entered.
<p>Loyalty Plan: NONE</p>	<ul style="list-style-type: none"> • Loyalty Plan: Here is where you can select the loyalty plan that you would like to be associated with the customer. <p>For more information on loyalty plans please see:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Customer_Loyalty_Detailed.pdf
<p><input type="checkbox"/> Print Notes on Receipt</p>	<ul style="list-style-type: none"> • Print Notes on Receipt: Here you can select to print the information on the Notes tab of customer maintenance.

<p>Bonus Points Achieved</p> <p>0</p>	<ul style="list-style-type: none"> • Bonus Points Achieved: Here is where the Bonus Points that have been accumulated via the Loyalty Plan selected above will be kept track of. This field is affected when the Loyalty Plan is Points Based. <p>You can set the amount of bonus points each inventory item is worth and it will be add to this field each time they are purchased. Once you reach a certain amount of bonus point you will be eligible to receive a loyalty plan.</p> <p>For more information on loyalty plans please see:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Customer_Loyalty_Detailed.pdf
<p>Birthday</p>	<ul style="list-style-type: none"> • Birthday: Here is where the birthday of the customer is entered. This field is utilized when using Loyalty Plans that are Birthday based. <p>For more information on loyalty plans please see:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Customer_Loyalty_Detailed.pdf
<p>Application Date</p> <p>1/11/2012</p>	<ul style="list-style-type: none"> • Application Date: Here is where the date that the customer applied for their account is automatically entered.
<p>Card Swipe IDs</p> <p>Add Del</p>	<ul style="list-style-type: none"> • Card Swipe IDs: Here is where the customer's loyalty cards can be entered. After the Loyalty Plan has been selected then you can assign cards to the customer account, making it easier to add a customer to an invoice. <p>These magnetic cards are available by contacting your sales rep at pcAmerica, 1-800-722-6374.</p>

Extended Info tab

The screenshot shows the 'Customer Maintenance' application window. At the top, it displays 'This Customer All Customers Print Customer Labels' and 'Information for: PCA Customer' with a 'Keyboard' button. Below this are input fields for Customer # (8007226374), First Name (PCA), Last Name (Customer), and E-mail Address (tech@pcamerica.com). A navigation bar includes tabs for General Info, Extended Info (selected), Account Info, Shipping/Billing, History, Notes, and Stores. The main content area is divided into several sections: 'Credit Card Info' with dropdowns for Credit Card Type (Mastercard selected) and Credit Card Number (masked), and an Expiration field (1212); 'Personal Info' with fields for Drivers License ID (123456789), Exp Date (12/12/2012), Mobile Phone ((845) 920-0800), and Fax ((845) 920-0880); 'Event' with Event Date (12/11/2012) and Event Description (Anniversary); and 'Referral Source' (Friend), Tax ID (123456789), and Tax Rate (1 - Rockland - 5.500%). At the bottom, there is a search bar, navigation buttons (Previous, Look up, Next), and action buttons (Add, Delete, Update, Exit). A status message indicates 'Last Search Returned 3 Customers'.

Extended Info tab - Screen Breakdown

<p>The close-up shows the 'Credit Card Info' section. It features a dropdown menu for 'Credit Card Type' with options: None, Mastercard (highlighted), Visa, and American Express. To the right, there are input fields for 'Credit Card Number' (displayed as 12 dots), 'Expiration' (displayed as 1212), and 'Exp Date'.</p>	<p>Credit Card Info</p> <ul style="list-style-type: none"> • Credit Card Type: Here you can select the type of credit card that the customer will have on file. • Credit Card Number: Here you can enter the credit card number that the customer will have on file. • Expiration: Here you can enter the expiration date for the credit card information on file. <p>When processing a new invoice this customer must be selected. When pay has been selected and then credit card has been selected as the tender type the stored credit card information will automatically be entered.</p>
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Event

Event Date

12/11/2012

Event Description

Anniversary

Event

- **Event Date:** You may enter an event date for a customer, such as an anniversary, in this field. You can then print labels for a specified range of event dates.
- **Event Description:** This is the description for the event date entered in the previous field. You can then print labels for a specified event description.

For more information on printing customer labels with Event information, please see: [Print Customer Labels - Event Range](#)

Personal Info

Drivers License ID

123456789

Exp Date

12/12/2012

Mobile Phone

(845) 920-0800

Fax

(845) 920-0880

Personal Info

- **Drivers License ID:** Enter the customers drivers license ID, this is sometimes required when paying with a personal check.
- **Mobile Phone:** Enter the customer's mobile phone number in this field.
- **Fax:** Enter the customer's fax number in this field.
- **State:** Here is where the state that the customer lives in is entered.

Referral Source
Friend
Tax ID
123456789
Tax Rate
1 - Rockland - 5.500%

- **Referral Source:** This is a good marketing tool that helps you keep track of where each of your customers hear about you store/restaurant or why they chose to shop/eat at your establishment. To choose a referral source, use the dropdown to select the desired source. Referral sources must be created prior to selecting them.
- **Tax ID:** Enter the customers Tax ID in this field.
- **Tax Rate:** If the customer has a specific (Area) tax rate that is different than your tax rate you can set it here. This is used if your company ships items to other counties in your state, or other states and you are required to apply the tax of the county to which you are delivering. If this is a standard walk-in customer, select the Default tax rate. To select an area tax rate use the dropdown to select it. Area tax rates must be configured before selecting them for customers.

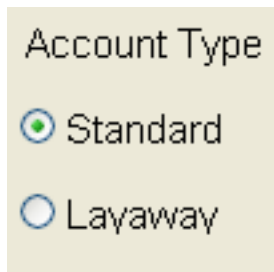
For information on adding Area Tax Rates please see:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Tax_Rates_Screen.pdf

Account Info tab

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Account Info tab - Screen Breakdown



Account Type

- **Standard:** Selecting this option will give the customer the ability to perform regular sales as well as on account sales. In order for a customer to do on account sales an **Open Account Date** must first be configured.
- **Layaway:** Selecting this option will give the customer the ability to perform regular sales as well as do Layaway sales. In order for a customer to do Layaway sales the layaway options must first be configured.

For information on configuring and using layaway please see the following document:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Using_Layaway.pdf

<div data-bbox="289 367 690 663" style="border: 1px solid #ccc; padding: 10px;"> <p>Open Account Date <input type="text" value="1/11/2012"/> <input type="button" value="O"/></p> <p>Close Account Date <input type="text" value="1/11/2020"/> <input type="button" value="C"/></p> </div>	<ul style="list-style-type: none"> • Open Account Date: This is where you can enter the date from which point the customer will have an open account. Just click the letter 'O' to the right of Open Account Date and it will automatically put in the current date after that you can adjust the date if needed. Once the customer has an open account they will be able to purchase items by putting them on account and paying for them at a later date. • Closed Account Date: This is where you can enter the date that the account will closed. From this date and later the customer will not be able to purchase items by putting them on account. To close a customer's account, select the C to the right of the Close Account Date field. The current date will appear in the Close Account Date box. You may also manually enter a close account date if it is different than the current date.
<div data-bbox="310 892 669 1031" style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <p>Balance Due</p> <p>\$0.00</p> </div>	<ul style="list-style-type: none"> • Balance Due: This shows the dollar amount that that the customer owes the establishment. This number is the total amount of all transactions that were put on account minus the payments and returns made on the account.
<div data-bbox="332 1142 646 1283" style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <p>Detailed Account Info</p> </div>	<ul style="list-style-type: none"> • Detailed Account Info: Click on this button to display the Account Details screen. You can also access the Accounts Details Screen by selecting Accounts Receivable from the Info menu on the Customer Maintenance screen.
<div data-bbox="289 1543 695 1682" style="border: 1px solid #ccc; padding: 10px;"> <p>Default Salesperson</p> <input type="text" value="100101"/> </div>	<ul style="list-style-type: none"> • Default Sales Person: You can assign a default salesperson to a particular customer. This is a good feature if your employees are commission based. <p>For more information on employee commission please see the following documents:</p> <ul style="list-style-type: none"> • http://faq.pcamerica.com/file-lockers/pdf-locker/Salespeople and Commissions.pdf • http://faq.pcamerica.com/file-lockers/pdf-locker/Commission by Item.pdf

<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center;">Membership Expiration</p> <p style="text-align: center; border: 1px solid black; padding: 2px;">1/11/2020</p> </div>	<ul style="list-style-type: none"> • Membership Expiration: This is the date when the customer's club membership expires. This date bears no relation to On Account info or the Bonus Points Plan. <p>The information entered here will be displayed on the Membership report.</p>
<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p>Credit Limit</p> <p>Max Balance <input style="width: 100px;" type="text" value="150.00"/></p> <p>Restrict spending to <input style="width: 100px;" type="text" value="50."/> over <input style="width: 50px;" type="text" value="10"/> days starting <input style="width: 100px;" type="text" value="1/11/20"/></p> </div>	<ul style="list-style-type: none"> • Max Balance: Here is where you can set the amount that the customer cannot exceed on their account. To enable this feature the option Max Balances must be enabled on the setup screen. • Restrict Spending to: You can limit the amount a customer can put on account over the course of a specified number of days. This option has three fields that need to be filled in order for it to be used: <ul style="list-style-type: none"> ○ Restrict Spending to: Here you will enter the dollar amount that they cannot exceed. ○ over_days: Here you will enter the amount of days that they can exceed that amount within. ○ starting: Here you will enter the date that the restriction takes effect.
<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p><input type="checkbox"/> Require PO # Entry</p> </div>	<ul style="list-style-type: none"> • Require PO # Entry: If the customer must be associated with a certain purchase order (for tracking purposes) you can use this option. When a transaction is completed and paid to on account with this customer CRE/RPE will prompt you to enter the associated purchase order number. The number entered here will print on the receipt.
<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center;">Authorized Members</p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 5px; text-align: center;">+</div> <div style="border: 1px solid black; padding: 5px; flex-grow: 1;">Sales</div> </div> <div style="display: flex; align-items: center; margin-top: 5px;"> <div style="border: 1px solid black; padding: 5px; margin-right: 5px; text-align: center;">-</div> <div style="border: 1px solid black; padding: 5px; flex-grow: 1;"></div> </div> </div>	<ul style="list-style-type: none"> • Authorized Members: You can assign the names of other customers to be associated with this customers account. When a sale is performed the cashier will get prompted with the other names that are authorized to pay merchandise to on account as the tender type. This is good for verification purposes, as the cashier will get prompted and they can verify the identity of the person with their driver's license.

Detailed Account Info Screen

The screenshot shows a software window titled "Account Details" with a blue title bar. It has two tabs: "Invoices" (selected) and "Payments". A green "Keyboard" button is in the top right. Below the tabs are radio buttons for "All Invoices", "Open Invoices" (selected), and "Paid invoices", along with a "Recall Invoice" button. A table displays invoice data:

Invoice #	Store ID	Date/Time	Total	OA Amt	AmtDue	Amt Applied
7	1001	2/3/2012 6:43 PM	\$10.83	\$10.83	\$8.83	\$2.00
8	1001	2/4/2012 5:42 PM	\$10.83	\$10.83	\$10.83	\$0.00

Below the table, the customer information "456 DL: A Test Customer" is shown on the left, and the "Balance Due: \$19.66" is displayed in large green text on the right. At the bottom, there are input fields for "Select Transaction Type" (Standard Payment), "Select Inv #" (Oldest), "Pay By" (Cash), and "Amount" (\$0.00). There are also buttons for "Statement", "Clear", "Exit", and a large "Apply Payment" button. A text box contains "Payment...Thank You!".

The Accounts Receivable screen allows you to update and manage a customer's account.


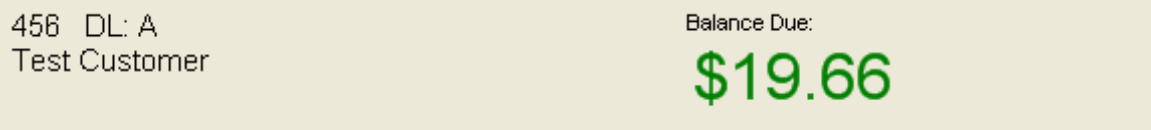
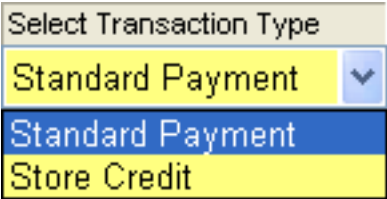
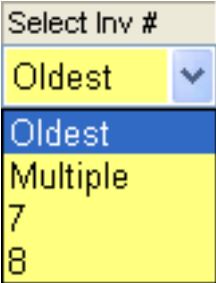
To access this screen, select Accounts Receivable from the This Customer menu

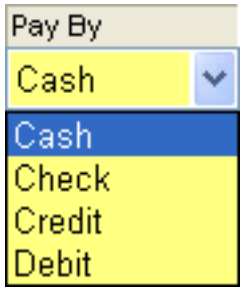

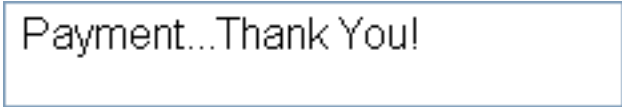




- [Screen Breakdown](#)

The detailed account info window can have two tabs of information:

- [Invoices tab](#)
- [Payments tab](#)

Detailed Account Info Screen - Screen Breakdown

	<ul style="list-style-type: none"> • Keyboard: Selecting this button will display the on screen keyboard. This is used by selecting the field you would like to enter text into and then selecting the Keyboard button where you will be able to type the information in, on screen.
	
<ul style="list-style-type: none"> • This area displays information about the customer’s account: <ul style="list-style-type: none"> ○ The left side of this section displays; The Customer Number, The Price Level applied to the customer, and the customers first and last name. ○ The right side of this section displays; the balance due from the customer. 	
	<ul style="list-style-type: none"> • Select Transaction Type: This is where you will select whether you are making a payment to the account or a store credit to the account.
	<ul style="list-style-type: none"> • Select Inv #: Here is where you have the choice of which invoice you would like to payoff, you will also have the option to pay off the oldest invoice in queue or multiple invoices (which you will be prompted to select).

	<ul style="list-style-type: none"> • Pay By: Here is where you select the payment method, you can choose between: Cash, Check, Credit or Debit.
	<ul style="list-style-type: none"> • Amount: Enter the amount you will apply to the account, based on the options selected above.
	<p>Here you will be able to make a note or memo as to the nature of this invoice.</p>
	<ul style="list-style-type: none"> • Apply Payment: This will apply the payment or credit to the account, based on the options selected above.
	<ul style="list-style-type: none"> • Statement: This will print out the current customer's statement; it will prompt you to enter the date range that you would like print the statement for.
	<ul style="list-style-type: none"> • Clear: Will set all of the payment options in this screen back to default.
	<ul style="list-style-type: none"> • Exit: Will exit from the detailed account info screen.

Invoices tab

Account Details

Invoices Payments Keyboard

All Invoices Open Invoices Paid invoices

Invoice #	Store ID	Date/Time	Total	OA Amt	Amt Due	Amt Applied
7	1001	2/3/2012 6:43 PM	\$10.83	\$10.83	\$8.83	\$2.00
8	1001	2/4/2012 5:42 PM	\$10.83	\$10.83	\$10.83	\$0.00

456 DL: A
Test Customer

Balance Due:
\$19.66

Select Transaction Type: Standard Payment
Select Inv #: Oldest
Pay By: Cash
Amount: \$0.00

Payment...Thank You

The Invoices tab allows you to view information about invoices associated with this customer's account.

To access this screen select the Invoices tab.

Invoices tab - Screen Breakdown

All Invoices Open Invoices Paid invoices

This area of the Invoices tab allows you to filter the results of what is being displayed here:

- **All Invoices:** Will show a list of every invoice that has been put on this account whether it has been paid or is still waiting to be paid.
- **Open Invoices:** Will show a list of only the invoices that still need to be paid for.
- **Paid Invoices:** Will show a list of only the invoices that have been paid for.

[Recall Invoice](#)

- **Recall Invoice:** You can click on an invoice in the list so it is highlighted and then click the recall invoice button and it will pull it back up on the invoice screen. From this point you have the ability to void, re-print or simply view that past invoice.

	Invoice #	Store ID	Date/Time	Total	OA Amt	AmtDue	Amt Applied
▶	7	1001	2/3/2012 6:43 PM	\$10.83	\$10.83	\$8.83	\$2.00
	8	1001	2/4/2012 5:42 PM	\$10.83	\$10.83	\$10.83	\$0.00

This area of the Invoices tab displays the following information:

- The Invoice # of the original transaction.
- The Store ID the invoice was processed at.
- The Date/Time the invoice was processed.
- The Total of the invoice, regardless of tender type.
- The total amount of the invoice that was paid to On Account (OA Amt).
- The total amount due to the outstanding balance (AmtDue).
- The total amount applied to the outstanding balance (Amt Applied).

Payments tab

Account Details

Invoices Payments Keyboard

All Invoices Open Invoices Paid invoices Recall Invoice

Invoice #	Store ID	Date/Time	Total	OA Amt	Amt Due	Amt Applied
7	1001	2/3/2012 6:43 PM	\$10.83	\$10.83	\$8.83	\$2.00
8	1001	2/4/2012 5:42 PM	\$10.83	\$10.83	\$10.83	\$0.00

456 DL: A
Test Customer

Balance Due:
\$19.66

Select Transaction Type: Standard Payment
Select Inv #: Oldest
Pay By: Cash
Amount: \$0.00

Payment...Thank You

Apply Payment

Statement
Clear
Exit

The Payments screen allows you to view all the transactions made on the customer's account.

To access this screen, select the Payments tab.

Payments tab - Screen Breakdown

	Trans ID	Date/Time	Trans Amount	Payment Method	Description
▶	7	2/4/2012 5:55 PM	\$2.00	CA	Payment...Thank You!
	4	1/19/2012 11:14 ...	\$10.83	OA	Invoice
	3	1/19/2012 11:14 ...	\$10.83	OA	Invoice

The transactions section of this screen will show a list of all the payments and store credits that have been applied to the account, including the following information:

- **Trans ID:** This column shows the invoice number for the transaction.
- **Date:** This column shows the date that the transaction was completed.
- **Trans Amount:** This column shows the amount for the transaction.
- **Payment Method:** This column shows the payment method for the payment (OA = On Account, CA = Cash, CH = Check, DC = Debit Card, and CC = credit card)
- **Description:** This column displays a brief description about the transaction.

Invoices the selected payment applied to:			
	Amount	Trans Id	Invoice Number
▶	\$2.00	5	7

This area displays information about the payment for the selected transaction in the above field: In this example Invoice Number 7 was selected in the above field.

- **Amount:** This column displays the amount of the payment.
- **Trans ID:** This column displays the Accounts Receivable transaction ID for this payment.
- **Invoice Number:** This column displays the Invoice Number for the invoice.

Shipping/Billing Tab

The screenshot shows a web application interface for 'Customer Maintenance'. At the top, there are links for 'This Customer', 'All Customers', and 'Print Customer Labels'. The main title is 'Information for: PCA Customer', with a 'Keyboard' button to the right. Below this, there are four input fields: 'Customer #' (8007226374), 'First Name' (PCA), 'Last Name' (Customer), and 'E-mail Address' (tech@pcamerica.com). A tabbed menu below includes 'General Info', 'Extended Info', 'Account Info', 'Shipping/Billing' (which is selected), 'History', 'Notes', and 'Stores'. The 'Shipping/Billing' tab is divided into two sections: 'Shipping' and 'Billing'. The 'Shipping' section contains fields for 'First Name', 'Last Name', 'Company Name', 'Phone Number', 'Street Address', 'City', 'Extended Address', 'State', 'Zip Code', and 'Country'. The 'Billing' section contains fields for 'Bill To', 'Primary Contact', 'Secondary Contact', 'Terms', and 'Resale Number'. At the bottom, there is a search bar labeled 'Search by Customer #' and a 'Look up' button. To the right of the search bar, it says 'Last Search Returned 3 Customers'. Navigation buttons include 'Previous', 'Next', 'Add', 'Delete', 'Update', and 'Exit'.

The Shipping/Billing tab allows you to enter the Shipping address and Billing information for this customer.

This information will print on full size invoices and full size professional invoices (receipts).

For information on configuring a full size professional receipt printer please see the document below:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Friendly_Printer_Setup.pdf

History Tab

Customer Maintenance
This Customer All Customers Print Customer Labels

Information for: **Test Customer Current Balance: \$10.83** Keyboard

Customer # 456 First Name Test Last Name Customer E-mail Address

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

Date and Time	Invoice#	Item#	Description	Quantity	Price	Store ID	Serial#
1/19/2012 11:14 AM	3	Test	Test Item	1	10.0000	1001	
1/19/2012 11:14 AM	4	Test	Test Item	1	10.0000	1001	
1/19/2012 11:14 AM	5	Test	Test Item	-1	10.0000	1001	
1/19/2012 11:14 AM	6	Test	Test Item	-1	10.0000	1001	
2/3/2012 6:43 PM	7	Test	Test Item	1	10.0000	1001	

Search by Customer # Select for current invoice

Previous Look up Next Last Search Returned 3 Customers

Add Delete Update Exit

The history tab displays a list of every item and invoice the customer has purchased since you started tracking them.

In order for information to be displayed here the customer must be selected (associated with) the invoice.

The information on this screen can be sorted by selecting the column header for what you would like to sort the information by.

This screen displays the following important information:

- The Dates and Times the transactions were performed
- The Invoice Numbers of the transaction
- The Item Number that was sold on the invoice
- The Item Description that was sold on the invoice
- The Quantity of the item sold on the invoice
- The Price the item was sold at on the invoice
- The Store ID the invoice was processed at
- The Serial Number of the item (if applicable)

For more information on using Serial Numbers please see the following document:

- http://faq.pcamerica.com/file-lockers/pdf-locker/Using_Serial_Numbers.pdf

Notes Tab

The screenshot shows the 'Customer Maintenance' application window. At the top, there are navigation links: 'This Customer', 'All Customers', and 'Print Customer Labels'. The main title is 'Information for: PCA Customer', with a 'Keyboard' button to its right. Below the title, there are four input fields: 'Customer #' (8007226374), 'First Name' (PCA), 'Last Name' (Customer), and 'E-mail Address' (tech@pcamerica.com). A tabbed interface below shows 'General Info', 'Extended Info', 'Account Info', 'Shipping/Billing', 'History', 'Notes', and 'Stores'. The 'Notes' tab is active, displaying a text area with the following content: 'This is an important customer.' and 'The customer has an allergic reaction to nuts.' At the bottom, there is a search section with a 'Search by Customer #' field, a 'Look up' button, and 'Previous' and 'Next' navigation buttons. To the right of the search section, it says 'Last Search Returned 3 Customers'. Further right are four buttons: 'Add' (green), 'Delete' (pink), 'Update' (green), and 'Exit' (pink).

The Notes tab allows you to enter information regarding your customer. This information can be used in one of two ways:

- The information can be kept private (so that your employees are the only ones who can see this information).
- The information can also be printed on receipts so that customers can see the information as well.

The way the information is used depends on how the option [Print Notes on Receipt](#) (General tab) is implemented:

- If the option is checked then the notes will be printed on the receipt.
- If the option is un-checked then the notes will stay private (for use with your employees).

Stores Tab

The screenshot shows a web application window titled "Customer Maintenance". At the top, there are links for "This Customer", "All Customers", and "Print Customer Labels". Below this is a yellow header for "Information for: PCA Customer" with a "Keyboard" button. The main form contains fields for "Customer #", "First Name", "Last Name", and "E-mail Address". The "Stores" tab is selected, showing a list with one entry: "1001". To the right of the list are two buttons: a green checkmark button and a red delete button. At the bottom, there is a search bar, navigation buttons ("Previous", "Look up", "Next"), and action buttons ("Add", "Delete", "Update", "Exit"). A status indicator shows "Last Search Returned 3 Customers".

The Stores tab allows you to associate your customers with stores in your enterprise.

Add a store that this customer is associated with?

- Select the Green check button to the right of the stores list.
- Select the store you would like to associate your customer with, then hit the Select button.
- The store will then appear in the list.
- Select Update to save your changes.

Remove a store that this customer is associated with?

- Highlight the store in the list.
- Select the Red delete button to the right of the stores list.
- The store will then be removed from the list.
- Select Update to save your changes.

How Do I...?

...Add a New Customer?

- Select the **Add** button on the bottom right of the screen.
- Select the **Customer Number** field so the cursor is flashing, then assign the customer a number.
- Hit the **Tab** key on the keyboard or select the **First Name** field and enter the customer's first name.
- Hit the **Tab** key on the keyboard or select the **Last Name** field and enter the customer's last name.
- You are finished entering the required info in order to create a customer, from here you can enter any other information you want to keep track of.
- Once you are finished entering the information you can select the **Save** button and your customer information will be saved.

...Open a Customer Account?

- You will first have to add the customer to CRE/RPE, to do so follow above steps.
- After the customer has been added select the **Account Info** tab.
- Enter the date you want the account to be opened where it says **Open Account** or select the **O** button to the right and it will enter today's date for you.
- Once you have the date entered select the **Update** button.
- Your customer now has an open account, and they will be able to pay invoices to **On Account**.

...Find an existing customer in the Customer Maintenance screen?

- Select the **Search by Customer #** box so the cursor is flashing.
- From here you can type the number of the customer, then hit enter which will bring up the customer so they can be edited.
- Alternatively you can use the next and previous buttons to scroll through your customers to the customer you would like to edit.

...Apply payment to multiple invoices?

- Select the **Account Info** tab.
- Select the **Detailed Account Info** Button.
- In the **Select Inv #** dropdown menu, choose **Multiple**.
- Select the **Select Invoices** button.
- Double-click to the left of the invoice number you would like to apply the payment to.
- When prompted type in the amount you wish to apply and select **Ok**.
- When you are finished, press the **Apply Payment** Button.

You have now applied payments to multiple invoices

...Apply payment to individual invoices?

- Select the **Account Info** tab.
- Select the **Detailed Account Info** Button.
- In the **Select Inv #** dropdown menu, choose the invoice you would like to apply the payment to.
- Type in the amount of the payment in the **Amount** field.
- Select **Apply Payment**.

You have now applied a payment to an individual invoice

...Make a payment on an account?

- Select the desired customer in the Lookup Customer screen (see: [Customer Lookup Window](#)), then either select [Accounts Receivable](#) from the This Customer menu, or select the [General tab](#) and select Detailed Account Info.
- Select the transaction type by using the dropdown under the Select Transaction Type field and highlighting the desired method. You may choose Payment or Store Credit.
- Select which invoice to which you would like to apply the payment. You may choose Oldest to apply the payment to the oldest invoice, Multiple to apply a payment to multiple invoices, or you can choose a specific invoice number. When selecting multiple invoices, you will be prompted to select the desired invoices. You will then also be prompted to enter the amount to apply to each invoice after selecting it.
- Choose the payment method (Cash , Check or Credit) by using the dropdown next to the Pay By field and highlighting the desired method.
- Enter the amount for the transaction in the Amount field.
- If you make a mistake, you can select the Clear button to clear any information that has been entered. You can also select on Exit to exit the Accounts Receivable screen.
- Select Apply Payment to apply the payment. If the form of payment is by check, you will be prompted to enter the check number. If the form of payment is credit card and no credit card information is entered in the **Credit Card Info** section, you will be prompted to enter the credit card number and expiration date.
- If **Prompt Cashier ID** is set to Yes in the Setup Screen, you will be prompted to enter your Cashier ID when entering a payment.

Print a statement:

- Select the desired customer in the Lookup Customer screen (see: [Customer Lookup Window](#)), then either select [Accounts Receivable](#) from the This Customer menu, or select the [General tab](#) and select Detailed Account Info.
- Select the **Statement** button.
- Enter the starting and ending date for the transactions for which you want to print a statement.

Note: Statements are formatted so that the address appears in the window of standard mailing envelopes.