

# Building Supply Controller Ver 7.3 Bulletin 0002

October 22, 2003

## Customer Setup/Maintenance Program

Contributed by Mainframe Associates

### **Menu Plate: BIBB**

The new Customer Setup/Maintenance program encompasses all of the features of the previous (version 6.3 and earlier) customer programs, as well as new features. It is organized in a less crowded, more efficient and intuitive format.

Previous access to customer setup required the user to enter three separate programs from three separate menu options (Customer Master, Customer Credit, and Customer Sales). The new Customer Setup/Maintenance program has combined this access into one program with six pages.

The new Customer Setup/Maintenance program allows you to determine which clerks can view credit information, which clerks can add customers, and which clerks can modify existing information. It is clerk security aware across all pages. The clerk would enter their passcode identifying themselves to the program using SF8 ClkAcces. Once entered, it does not need to be entered again unless the clerk exits the program. Without authorization, the lowest level of access is set, allowing clerks to view and edit contact information, but no sales and customer account information. Also, customer reports (F7 Reports) are unavailable.

You may scroll through the customer file (with the up- and down- arrow keys) while on any of the six pages. Using SF3 LoadCust also allows the loading of a new customer straight to the currently viewed page.

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## Page 1 – Customer Contact Information

This screen covers the primary address/phone/email address for the customer. You may now input **multiple addresses, phone numbers and emails**. A number of fields now appear with pop up windows to ensure that only valid inputs can be made. If no customer number is entered when adding a new customer, the next available customer number is automatically assigned.

Creation of a new customer requires filling out this first screen only. After this, an F10 'File' option appears, giving the clerk the choice to complete and save a new customer account with a minimum of information. Creation of new customers uses the defaults set in plate BFNDBJ.

BIBB Customer Setup / Maintenance 7.3.14.004

```
Customer Number: [ ]
Page 1 of 6
Customer Contact Information:
1. Name 1 [ ]
2. Name 2 [ ]
3. Street Address [ ]
4. City [ ]
6. State [ ] 7. Zip Code [ ]
8. Country [ ]
9. Main Phone [ ] Ext [ ] Contact [ ]
10. Alternate Phone [ ] Ext [ ] Contact [ ]
11. Fax [ ]
12. E-mail Address [ ]
13. E-mail Contact [ ]
```

Enter the customer or loyalty membership number, F9 Lookup, or F1 to Exit,...

Clear Utlis  
F1 F2 F3 F4 F5 F6 F7 F8 F9 F10  
Exit NewCust Vessel Reports Lookup

For addresses in the US, the fields change from 'Province/Postal Code' to 'County/State/Zip Code'. It is now possible to set tax levels based on County.

The page down key takes you to the next page...

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## Page 2 – Personal and Business Information

Page 2 separates Personal Information from Business Information. We now allow for multiple Credit Cards and Banking information. Credit card numbers are validated (just like at Point-of-Sale). New fields for shipper's name and account number have been designated.

BIBB Customer Setup / Maintenance 7.3.14.004

Customer Number: [            ]			
Page 2 of 6			
Personal Information:			
1) Group / Check Dgt [   ]	4) Birthdate [            ]		
2) Driver's License [            ]	5) Spouse birthdate [            ]		
3) SIN [                    ]	6) Anniversary [            ]		
Business Information:			
7) Credit Cards: Type [   ]	Number [            ]	Exp [            ]	
	Type [   ]	Number [            ]	Exp [            ]
8) Bank: Name [                    ]			
Address [                    ]			
Phone [                    ]			
Contact [                    ]			
9) Shipper: Name [                    ]			
Account # [                    ]			

Modify field [   ]

Select a field, <PageUp>/<PageDown> to change screens, <ENTER> to Save...

	ShipAdd	LoadCust				ClkAcces	Utils		
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Clear	Flags		Delete	Ref	Vessels	Reports	Memo		File

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## Page 3 – Account Setup Information and EPD Status

Page 3 contains information regarding the account setup for credit and billing. It also includes the lookup name. Choice lists are available for many fields.

Early payment discount controls are now on this page. You can set early payment discounts by customer. You can set them to expire a number of days after the invoice date or a number of days after the end of the month.

BIBB		Customer Setup / Maintenance		7.3.14.004	
Customer Number: [            ]					
Page 3 of 6					
Account Setup Information:					
1. Creation Date	[            ]	3. Bill-To Account	[            ]		
2. Store Created	[            ]	4. Statement Account	[            ]		
5. Lookup Name	[            ]				
6. Payment Terms	[            ]	7. Account Status	[            ]		
8. Account Type	[            ]	9. Customer Class	[            ]		
10. Default PO#	[            ]				
11. GST Number	[            ]				
12. PST Number	[            ]	13. Customer Flags			
EPD Status:					
14. EPD Active	[            ]	EPD Expiry Code	[            ]		
Current EPD	[            ]	Previous EPD	[            ]		
Modify field [            ]					
Select a field, <PageUp>/<PageDown> to change screens, <ENTER> to Save,...					
ShipAdd		LoadCust		ClkAcces	
F1	F2	F3	F4	F5	F6
F7	F8	F9	F10	Utils	
Clear	Flags	Delete	Ref	Vessels	Reports Memo
				File	

Customer Flags are set up in the flag window (F2 Flags).

```

[ Customer Flags for ANNE ]
P0 Required? (Y/N) [N]
Use Customer Pricing? (Y/N) [Y]
Customer Statements (Y/N/F/E) [Y]
Use Reference? (Y/N/R) [Y]
GST exempt? (Y/N) [N]
PST exempt? (Y/N) [N]
Job Name/Location? (Y/N/R) [N]
Get Shipping Address? (Y/N) [N]
Package Deal Customer? (Y/N) [N]
Update QOH On Held Inv? (Y/N) [N]
    
```

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## Page 4 – Customer Sales, Customer Discounting, and Miscellaneous Information

The Customer Sales section of this page displays sales related information. The Customer Discounting section allows you to set discounting by customer. The Miscellaneous Information section allows you to designate a clerk as a sales representative, and to set a commission rate for sales to the customer.

Customer Number: [            ]		Page 4 of 6	
Customer Sales:			
Last Sale Date	[            ]	Monthly Average	[            ]
Last Sale Amount	[            ]	Months for Avg	[            ]
MTD Purchases	[            ]		
COGS	[            ]	Last Year Sales	[            ]
YTD Purchases	[            ]	Total Purchases	[            ]
COGS	[            ]	Loyalty Program #	[            ]
Customer Pricing:			
1. Default Price Level [            ]			
Miscellaneous Information:			
2. Sales Rep [            ]		3. Commission Rate [            ] %	

Modify field [    ]

Select a field, <PageUp>/<PageDown> to change screens, <ENTER> to Save...

ShipAdd		LoadCust		ClkAcces		Utils			
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Clear	Flags	Loyalty	Delete	Ref	Vessels	Reports	Memo		File

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## Page 5 – Account Credit Status and Payment Status

This page contains the account credit /status information.

BIBB Customer Setup / Maintenance 7.3.14.004

Customer Number: [            ]		Page 5 of 6	
Account Credit Status:			
Current	[            ]	1. Credit Status	[            ]
30 Days	[            ]	2. Credit Limit	[            ]
60 Days	[            ]	Available Credit	[            ]
90 Days	[            ]	3. Doubtful Amount	[            ]
Balance	[            ]	Max. Credit Given	[            ]
		Max. Credit Date	[            ]
Suspended Inv Amt [            ]			
Payment Status:			
Last ROA Date	[            ]	ROA Pending	[            ]
Last ROA Amount	[            ]	Payments: MTD	[            ]
Last ROA Interval	[            ] days	YTD	[            ]

Modify field [    ]

Select a field, <PageUp>/<PageDown> to change screens, <ENTER> to Save,...

ShipAdd		LoadCust		ClkAcces		Utils			
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Clear	Flags	Delete	Ref	Vessels	Reports	Memo			File

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## Page 6 – Finance Charges and Billing/Statement Status

This page contains Finance Charge and Billing information.

BIBB		Customer Setup / Maintenance		7.3.14.004	
Customer Number: [            ]					
Page 6 of 6					
Finance Charges:					
1.	F/C Code	[    ]	Current	[    ]	
	F/C Rate	[    ] %	30 Days	[    ]	
2.	Start Period for F/C	[    ] days	60 Days	[    ]	
3.	60 Day Handling Charge	[    ]	90 Days	[    ]	
	Balance subject to F/C	[    ]			
	F/C: Current	[    ]	Balance	[    ]	
	YTD	[    ]			
Billing/Statement Status:					
	Min. Payment Due	[    ]	Bill-To Account	[    ]	
	Statement Date	[    ]	Statement Account	[    ]	
			Print/Fax Statement	[    ]	

Modify field [    ]

Select a field, <PageUp>/<PageDown> to change screens, <ENTER> to Save,...

ShipAdd		LoadCust		ClkAcces		Utils			
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Clear	Flags	Delete	Ref	Vessels	Reports	Memo			File

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## F7 – Customer Inquiries and Reports Options

This function key is available from all screens provided the clerk has proper authorization.

BIBB		Customer Setup / Maintenance		7.1.57	
Customer Number: [ANNED ] Mr. & Mrs. Ed Annau					
Page 6 of 6					
Finance Charges:					
1. F/C Code	[	Customer Inquiries and Reports ]			-50.00]
F/C Rate	1	Customer Account Inquiry			0.00]
2. Start Period	2	Customer Payment History			0.00]
3. 60 Day Handl	3	Reprint Customer Invoices			0.00]
Balance subj	4	Customer Discount Report			
F/C: Curren	5	Customer Sales by Department Report			-50.00]
YT					
Billing/Statement Status:					
Min. Payment Due	[	0.00]	Bill-To Account	[ANNED ]	
Statement Date	[	10/01/2003]	Statement Account	[ANNED ]	
			Print/Fax Statement	[Y]	

Modify field [ ]

Select a report to run and press <ENTER>, or press <F1> to exit....

F1 F2 F3 F4 F5 F6 F7 F8 F9 F10  
ExitWin

# Bulletin 0002 – Customer Setup/Maintenance Program continued

## sF10 – Util – Utilities Choice List

This function key is also available from all pages provided the clerk has proper authorization.

<b>BIBB</b>	<b>Customer Setup / Maintenance</b>	<b>7.1.57</b>
Customer Number: [ANNED ] Mr. & Mrs. Ed Annau Page 6 of 6		
Finance Charges:		
1. F	[ Customer Maintenance Utilities ]	01
F	1 Create/rebuild customer name cross-reference file	01
2. S	2 Create/rebuild customer phone number cross-reference file	01
3. 6	3 Customer duplicate cross-reference report	01
B	4 Create/rebuild extended customer database	
F	5 Build customer class code file from current data	01
	6 Update to use new EPD customer identification	
	7 Change customer number	
	8 Add customer information to CONTACT	
M		
Statement Date	[10/01/2003]	Statement Account [ANNED ]
		Print/Fax Statement [Y]

Modify field [ ]

Select a utility to run and press <ENTER>, or press <F1> to exit,...

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
----	----	----	----	----	----	----	----	----	-----

ExitWin

1