2.4 CUSTOMER

2.4.1 HOW TO CREATE A CUSTOMER

To create a Customer, the current active Order Form must be empty or else the Customer Form will display the Customer Information of the Customer in the Order Form and will only allow editing.

Open Options

#	Action	Notes
1	Select	From the Main Menu Options: 'File' and then 'Customer' or
1	Enter	Ctrl + F1

The Customer Windows Form will open in the 'Search Mode', to create a New Customer:

#	Action	Button or Icon	Notes
1	Press	🗋	Puts the Customer Form in 'New Mode'.

Mandatory Fields (Underlined)

#	Enter	Notes	Input
1	Name	The Customer's name.	Alpha Numeric
2	ZIP / Post Code	The Customer's ZIP or Post Code.	Alpha Numeric
2	City	The Customer's City.	Alpha
2	Day Phone	The telephone number where the Customer may be contacted during office hours. This number is also important because it is used to create the Customer Number.	Numeric

Optional Fields

#	Enter	Notes	Input
1	Address	The address of the Customer. Use both fields if required.	Alpha Numeric
2	Province / State / County	If enabled, select the corresponding Province, State or County.	Select
3	Mobile	The Mobile or Cell phone number of the contact at the Customer.	Numeric
4	Fax	The Fax number of the Customer.	Numeric
5	e-mail	The e-mail of the Customer. Must contain one '@' and one '.'.	Alpha Numeric
6	CC Mail	If the Customer wants copies of the e-mails sent to the other e-mail addresses in the Drop-Down Box.	Check
7	Recipient Only	If the Customer only wants the e-mails sent to the recipient.	Check
8	Remarks	Any relevant remarks about the Customer. This information is internal only and will not be displayed anywhere else but in this form.	Alpha Numeric

9	Account	The accounting account number that this customer's accounts are updated.	Alpha Numeric
10	VIP Group	If this Customer is assigned to any VIP Group.	Alpha Numeric
11	Project	If this Customer belongs to any Project.	Alpha Numeric
12	Credit Amount	The Credit Amount that this Customer will receive, if any.	Numeric with Decimals
13	Credit Days	The Days of Credit that the Customer will receive if any.	Numeric
14	Form of Payment	The Form of Payment for this Customer.	Select

Display Fields (Disabled)

#	Enter	Notes	Input
1	Customer Number	The Customer Number, generated by the system.	Disabled
2	Balance	The current balance of the Customer, generated by the system.	Disabled
3	Prepaid	The amount the Customer has prepaid, generated by the system.	Disabled
4	User ID	The User ID of the User that last changed this Customer Information.	Disabled
5	Last Change	The date, that last change to the Customer Information was made.	Disabled

Final Actions

#	Action	Button or Icon	Notes
1	Press	💾	Saves the Customer Information.
2	Press	✕	Exits the Customer Windows Form.

If you wish to create another New Customer:

#	Action	Button or Icon	Notes
1	Press	🗋	Clears the Customer Form and puts the Customer Form in 'New Mode'.

If you wish to search for a Customer and there is no open Order:

#	Action	Button or Icon	Notes
1	Press	🔍	Clears the Customer Form and puts the Customer Form into 'Search Mode'.

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2.4.2 HOW TO EDIT A CUSTOMER

If there is an Order Active, then the Customer Form will display the Customer Information on the Customer that is in the current active Order. If you wish to edit a Customer that is not in the current active Order, then you must be on an empty Order. (See How to Search a Customer).

Open Options

#	Action	Notes
1	Select	From the Main Menu Options: 'File' and then 'Customer' or
1	Enter	Ctrl + F1

Editable Fields

#	Enter	Notes	Input
1	Name	The Customer's name.	Alpha Numeric
2	Address	The address of the Customer. Use both fields if required.	Alpha Numeric
3	Country	This is the country where the Customer's address and telephone numbers are located.	Select
4	Province / State / County	If there is information on the country selected, provinces, states or counties, then the field will be enabled for selection	Select
5	ZIP / Post Code	The Customer's ZIP or Post Code.	Alpha Numeric
6	City	The Customer's City.	Alpha
7	Day Phone	The telephone number where the Customer may be contacted during office hours. This number is also important because it is used to create the Customer Number.	Numeric

#	Enter	Notes	Input
8	Mobile	The Mobile or Cell phone number of the contact at the Customer.	Numeric
9	Fax	The Fax number of the Customer.	Numeric
10	e-mail	The e-mail of the Customer. Must contain one '@' and one '.'.	Alpha Numeric
11	CC Mail	If the Customer wants copies of the e-mails sent to the other e-mail addresses in the Drop-Down Box.	Check
12	Recipient Only	If the Customer only wants the e-mails sent to the recipient.	Check
13	Remarks	Any relevant remarks about the Customer. This information is internal only and will not be displayed anywhere else but in this form.	Alpha Numeric
14	Account	The accounting account number that this customer's accounts are updated.	Alpha Numeric
15	VIP Group	If this Customer is assigned to any VIP Group.	Alpha Numeric
16	Project	If this Customer belongs to any Project.	Alpha Numeric
17	Credit Amount	The Credit Amount that this Customer will receive, if any.	Numeric with Decimals
18	Credit Days	The Days of Credit that the Customer will receive if any.	Numeric
19	Form of Payment	The Form of Payment for this Customer.	Select

Display Fields (Disabled)

#	Enter	Notes	Input
1	Customer Number	The Customer Number, generated by the system.	Disabled
2	Balance	The current balance of the Customer, generated by the system.	Disabled
3	Prepaid	The amount the Customer has prepaid, generated by the system.	Disabled
4	User ID	The User ID of the User that last changed this Customer Information.	Disabled
5	Last Change	The date, that last change to the Customer Information was made.	Disabled

Final Actions

#	Action	Button or Icon	Notes
1	Press	💾	Saves the Invoice to the database.
2	Press	✕	Exits the Customer Windows Form.

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2.4.2 HOW TO SEARCH A CUSTOMER

If the Order Form was empty then the Customer Form will appear in the 'Search Mode'.

To Find a Customer you have 2 options, either use the Customer Number or the Customer Name.

To find a Customer with the Customer Number:

#	Enter	Notes	Input
1	Customer N°	The Customer Number of the Customer, which is usually their Day Phone Telephone Number.	Alpha Numeric

The system will search for a Customer, with the Customer Number you have just entered. If a Customer is found, the system will display all the Customer Information available. If it is not found, then the system will display a message.

To Find a Customer with the Customer Name:

#	Enter	Notes	Input
1	Name	This is the Customer Name.	Alpha Numeric

This will display the Customer List Form.
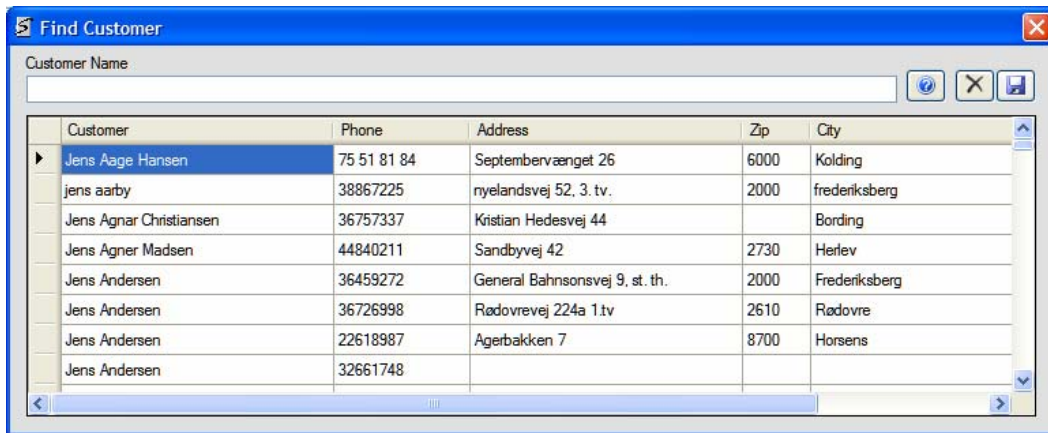
Use the vertical slider to locate the Customer. Use the Customer Name field to do other searches.

Final Actions

#	Action	Button or Icon	Notes
1	Double-click	▶	The Row Header Control Box on the left of the row where the Customer is located. The Customer Information will be returned.
2	Press	💾	With a row selected. The Customer Information will be returned.
3	Press	✕	Exits and does not return a selected Customer.

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