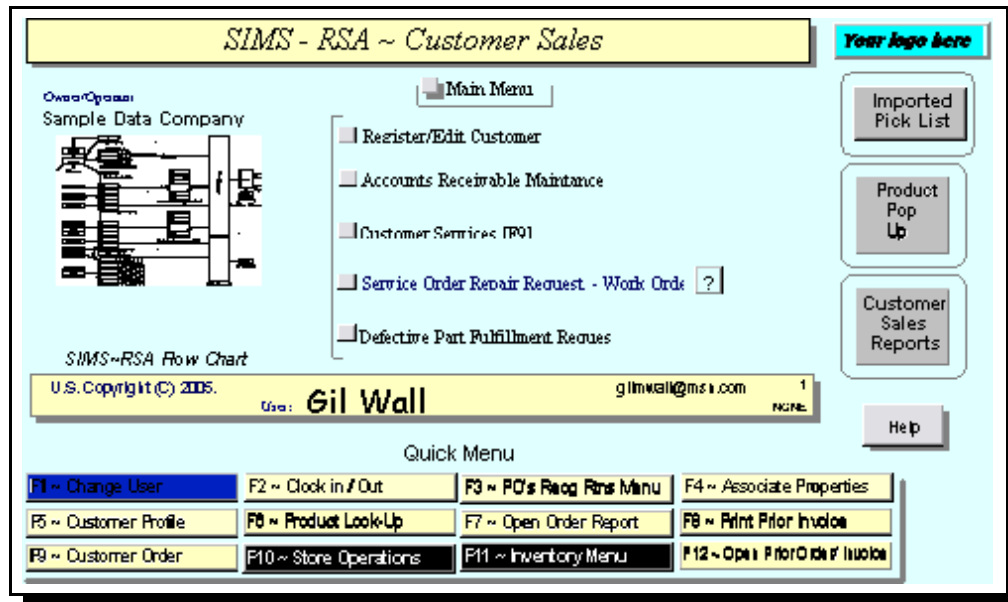


## WAASIMS DOCS RSA - Creation and Edit Customer



### Customer Creation]

Create a new customer Click New Customer, next enter the Customer Account Reference Number (CARN) and click the Done Button. The CARN is a number that you assign, this field is a drop down window you can view your last number assignment.

Why it's good to create a customer? ...Customer request to by on credit. ...Customer request a record of purchases. High volume client, good to track. Good for historical reasons and mail outs.

### [Edit / View Customer]

#### Macro Find

Click on edit customer, this invokes a macro find here you have two chooses, simply press the enter key without entering any data in displayed fields. This will fill all customers and display them in a scroll list. To the left of each name you will see a [E] this E is for Edit click on the E next to the name of the customer you wish to view or edit.

During the macro find you can narrow your search you attaching data to the display fields in the macro fields. Once filled press the Enter Key.

#### Edit/View Customer

This fields are required data to represent you customer, Billing and Shipping information. Hook UP's to other reports, Spell Check, and Next and Back Entry to view other customer records that may of been selected from you macro find.

#### Customer Detail

##### [Tax Territory Section]

This area is where the tax base of the customer resides. Assign the State, the edit the sale tax rate and if the business is a Resale client enter their sales tax license number.

##### [Accounts Receivable Section]

This area you assign the sales associate for this account, for billing their terms for payment

and the credit limit. Note! The POS does not have cutoff related to the credit limit. The Customer Edit does have a flag to cut off the POS for customers that write bad checks or have a hold for non payment of credit accounts.

**SIMS ~ RSA - Edit Customer**

Title: Not Registered Sales    Customer's Name (Last, First I.): All General Sales    Company Name: ALL GENERAL SALES

Sales Tax Territory: State MD, Tax Rate (0.0000) 0.085

Account Exp. Summary:

Invoice Date	Invoice Total	Invoice Due Date
	\$ 4,964.96	12/18/03
	# of Invoices: 376	Average Invt: \$196.38
	Last Invoice: TAXI, Dec 18, 2003	Credit Date:    Balance: \$0.00
	Open Order \$:	\$16,506.18

Head about us: General Sales

Driver's Lic. # / Resev / Exp. Date

Next Entry?    Prior Entry?    Menu

Customer Type: Walk In

Internet Order

PRODUCT

INCR1    INCR2    Date Placed on Web

### How did you here about us? and Type of Business

Type of customer fields are included for reporting and informs you how customers find out about your business.

#### [Internet Section]

These are customers that are downloaded from your Internet web site and are imported then added to your customer set. Explaining what they ordered, what price and when the order was received on your web site and then shipped and billed on your POS system.

#### [Customer Import Pick List]

This import form can be invoked from the customer select form. The import file is called: Order.txt. With Windows XP file resides in MyDocuments Download folder.

Once downloaded a pick list will display, to add the Internet customer to your SIMSRSA Customer database click on the P to the left of the customer's name. P = Pick. The customer will be included and added to the Customer database at this point you can edit and Click customer order and fill the order. The Pick List will display DONE to the right the line to indicate the customer has been added.

#### [Customer Membership]

Here you can apply a general discount to the client. The default is set at 0% Recommended is 10% . Enter a percentage for example 1% is [.001] and 10% is [.1]

**[Sales and Journal History]****[Journal History]**

SIMS		Customer #	Customer's Name		Return		Next Entry?	
		100	ALL GENERAL SALES				Prior Entry?	
P   = Pick and view Invoice		Company Name		Sales History		Find Other?		
		All General Sales				Menu		
Inv./Ref	Date	Reference	Type	Clerk	Sales Tax	Shipping	Register ID	Total Sale
P 682	12/18/2003	1234	CHEK	NALAYA WALL	\$102.09		Two	\$1,303.04
P 681	12/18/2003		CASH	GIL WALL	\$0.42		One	\$5.41
P 679	12/18/2003		CCRD	GIL WALL	\$79.11		One	\$1,009.60
P 678	12/18/2003		ORDER	GIL WALL	\$0.00		One	\$0.00
P 677	12/18/2003		CCRD	GIL WALL	\$296.58		One	\$3,785.58
P 676	12/18/2003		ORDER	GIL WALL	\$0.00		One	\$0.00
P 675	12/17/2003	342	CHEK	GIL WALL	\$15.30		One	\$195.25
P 674	12/17/2003		CCRD	GIL WALL	\$9.01		One	\$114.96
P 673	12/17/2003	897	CHEK	GIL WALL	\$3.06		One	\$39.01
P 672	12/17/2003		CASH	GIL WALL	\$0.51		One	\$6.46
P 671	12/14/2003	123	CHEK	NALAYA WALL	\$6.72		One	\$85.72
P 670	12/14/2003		CASH	NALAYA WALL	\$6.80		One	\$86.75
P 668	12/13/2003		CASH	GIL WALL	\$1.11		One	\$14.11
P 667	12/13/2003		CASH	GIL WALL	\$0.94		One	\$11.94

Purchase \$	# of Purchase	Average Purch	Last Purchase	Credit Due	Tax Charge	Tax Expense	Tax Balance
\$ 4,664.96	376	\$12.38	12/18/2003		\$0.00	\$0.00	\$0.00

Journal History

**Journal History** displays the header of the purchase, total purchased, date, payment type.

**[Sales History]**

SIMS		Customer #	Customer's Name		Return		Next Entry?
		100	ALL GENERAL SALES				Prior Entry?
		Company Name		Journal History		Find Other?	
		All General Sales				Menu	
Inv./Ref	Date	Item Number	Item Description	Qty	Sold @ Price	Ext Price	Serial Number
682	12/18/2003	100208	100MHz bus Power System	1	\$1,195.00	\$1,195.00	
682	12/18/2003	100302	AT SERIAL ADAPTOR	1	\$5.95	\$5.95	
681	12/18/2003	100295	10' Snagless Cat5e Blue UTP	1	\$4.99	\$4.99	123443
681	12/18/2003			1		\$0.00	
679	12/18/2003	100295	10' Snagless Cat5e Blue UTP	1	\$4.99	\$4.99	
679	12/18/2003	100376	1000FT or More Network cable per	30	\$0.29	\$8.70	
679	12/18/2003	100467	8-Port Fast 100BaseT Hub	1	\$199.95	\$199.95	
679	12/18/2003	100429	Dmd Supra 56K Int. ISA Fax/Modem	2	\$89.00	\$178.00	
679	12/18/2003	100159	Sound Blaster Live w/Digital I/O Card	1	\$199.95	\$199.95	
679	12/18/2003	100389	8X IDE 4CD Changer Drive	1	\$99.95	\$99.95	
679	12/18/2003	100218	Upgrade / 17"(28)to CTX 17"(28)	1	\$49.00	\$49.00	
679	12/18/2003	100402	Intel USB Camera Kit	1	\$189.95	\$189.95	
677	12/18/2003	100208	100MHz bus Power System	1	\$1,195.00	\$1,195.00	
677	12/18/2003	100209	PII450 Platimun Package	1	\$2,269.00	\$2,269.00	

Purchase \$	# of Purchase	Average Purch	Last Purchase	Credit Due	Tax Charge	Tax Expense	Tax Balance
\$ 4,664.96	376	\$12.38	12/18/2003		\$0.00	\$0.00	\$0.00

Sales History

**Sales History** displays each record of the Jentry database showing the items purchased.