

Creating a Customer Account

Customer Maintenance

This Customer All Customers Print Customer Labels

Information for: Pca Customer Keyboard

Customer # 8459200880	First Name Pca	Last Name Customer	E-mail Address
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General Info
Extended Info
Account Info
Shipping/Billing
History
Notes
Properties

Company Name pcAmerica	Primary Phone # 845-920-0880	Bonus Points Achieved 0
Street Address One Blue Hill Plaza	Alternate Phone #	Birthday
Street Address 2	City Pearl River	Application Date 5/26/2009
State NY	Zip Code 10965	County US
Discount Percentage 0.00%	Discount Level A	Card Swipe IDs
<input type="checkbox"/> Charge At Cost	<input type="checkbox"/> Tax Exempt	<input type="checkbox"/> Print Notes on Receipt

Select for current invoice
 Add
Delete

Previous
Look up
Next
Update
Exit

Last Search Returned 2 Customers

Manager

Options

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

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**.
6. If applicable fill in the information under General Info.

Customer Maintenance
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Customer # First Name Last Name E-mail Address

Account Type
 Standard
 Layaway

Open Account Date
Close Account Date

Balance Due \$0.00

Default Salesperson
 Membership Expiration

Credit Limit
 Max Balance Require PO # Entry
 Restrict spending to
 over days starting

Authorized Members

7. Select the **Account Info** tab.
8. For **Account Type**:
 - Select **Standard** to have a customer with a standard account.
 - Select **Layaway** to have a customer available for the Layaway features of the software.
9. Under **Open Account Date** select the **O** which will fill in today's date. This is the recorded date when the account was opened.
10. Under **Close Account Date** select the **C** which will fill in today's date which you will change until a later date in time. This is useful for limiting the amount of time that the account can be open.
11. Select **Save** and then select **Exit**.