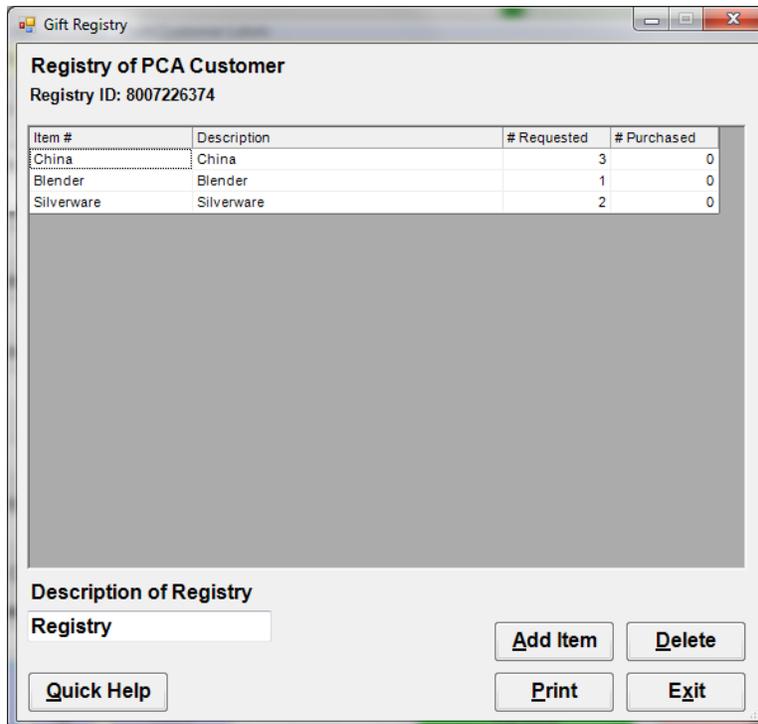


Creating a Customer Registry



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

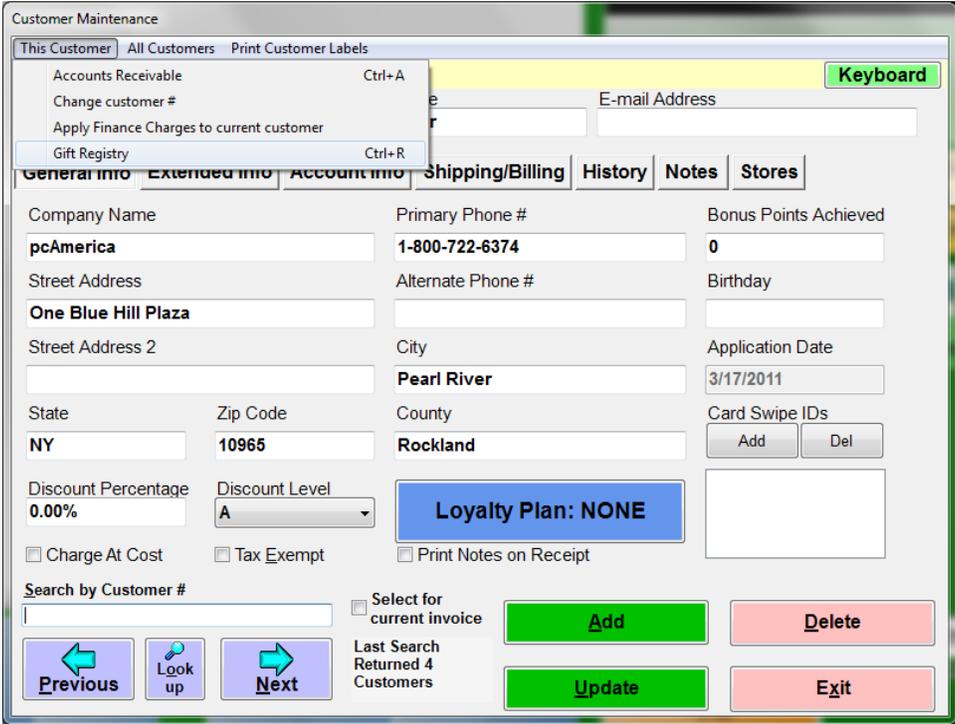
Offering this service to your customers will result in their friends coming to you to buy those gifts.

Note: Prior to creating a Gift Registry a customer must be created. For more information on creating new customers please see the document titled **Creating a New Customer Account** located at:

1. <http://faq.pcamerica.com/>

Configuring a Customer Gift Registry

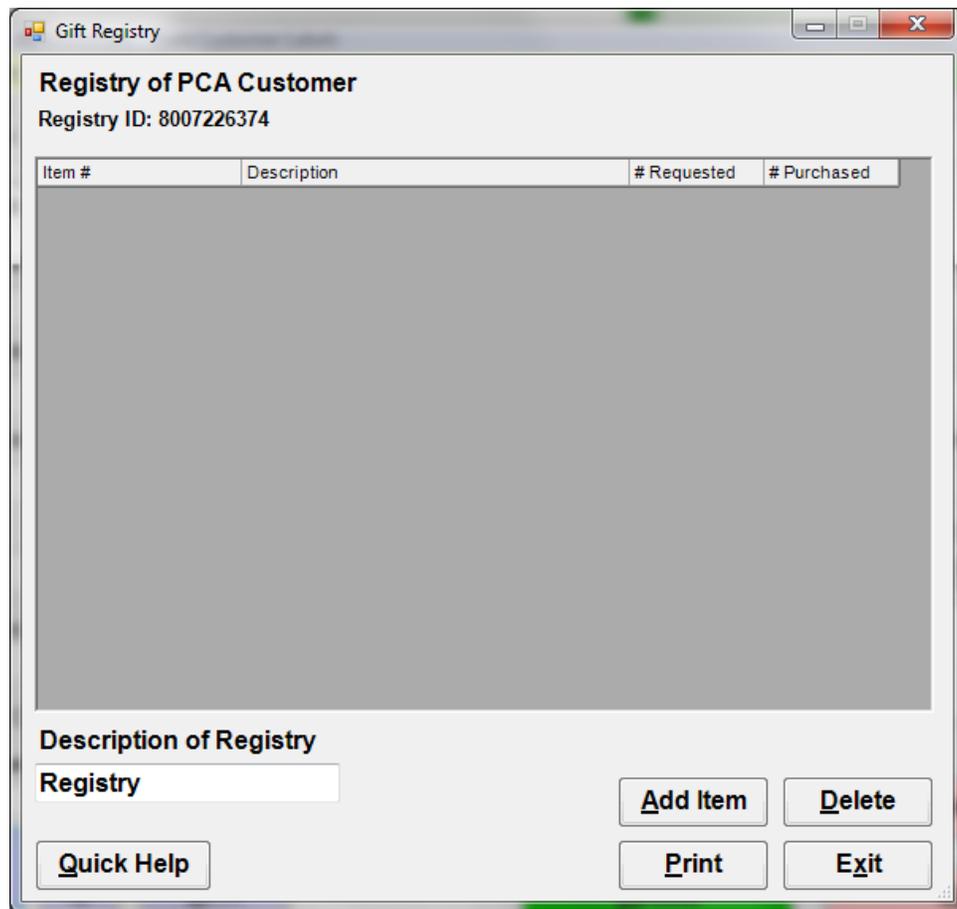
 	<ol style="list-style-type: none">1. Select the Manager or Options button.2. Enter the administrator password (default: admin) where applicable.3. Select Administrative then, Customer Maintenance.
------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



The screenshot shows the 'Customer Maintenance' window. A dropdown menu is open under 'This Customer', with 'Gift Registry' selected. The main window displays customer information for 'pcAmerica', including primary and alternate phone numbers, address, city (Pearl River), state (NY), and zip code (10965). There are buttons for 'Add', 'Delete', 'Update', and 'Exit' at the bottom right. Navigation buttons 'Previous', 'Lookup', and 'Next' are at the bottom left.

4. At the **Customer Maintenance** screen use the navigation at the bottom left (Previous, Lookup, Next) to bring up the customer you would like to edit the registry for.
5. Select the **This Customer** menu and then select **Gift Registry**.

Note: You can also access the gift registry screen from customer maintenance by pressing **Ctrl+R** on your keyboard.



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.)

Note: The **Registry ID** (at the top of this window) is the **Customer Number**, this number will be needed when gift purchasers will be purchasing items on this registry.

6. Enter the **Description of Registry**.
7. To add an item to the registry, select **Add Item**.

Enter item # of item to add to registry

Cancel

Backspace

1 2 3 4 5 6 7 8 9 0 -

Q W E R T Y U I O P

A S D F G H J K L :

Z X C V B N M , . /

Shift SPACE ENTER

2. You will be prompted for the item # of the item you would like to add to the registry.

Enter # to add

2

7 8 9

4 5 6

1 2 3

. 0 +/-

Clear Cancel

OK

3. You will also be prompted for the quantity requested of that item.

Gift Registry

Registry of PCA Customer

Registry ID: 8007226374

Item #	Description	# Requested	# Purchased
	Silverware	2	0
	China	3	0
	Blender	1	0

Description of Registry

Registry

Quick Help

Add Item Delete

Print Exit

After adding all of the items to the registry you have the following options:

4. To delete an item off of the registry, select the item in the grid, and select **Delete**.
5. To view a printable copy of the registry, select the **Print** button. A copy will then print to the screen (see below).
6. To save your changes to the registry and exit select **Exit**.

Customer Gift Registry Summary

3/17/2011

Item #	Item Name	Price	In Stock	Quantity Requests Remaining	Quantity To Order
Blender	Blender	\$25.99	6	1	0
China	China	\$29.99	6	3	0
Silverware	Silverware	\$100.00	0	2	2

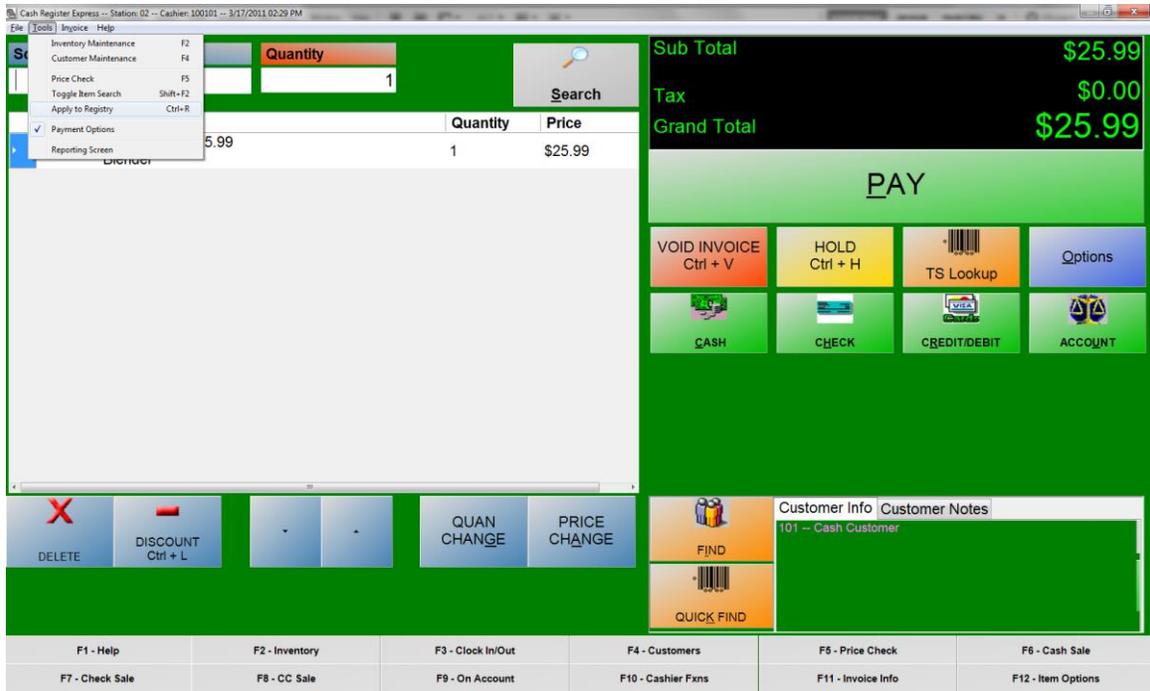
Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

If you selected **Print**, then the **Customer Gift Registry Summary** will be displayed on screen, with the following information:

- **Item #** (Number)
- **Item Name** (Description)
- **Price** (less tax)
- **In Stock** (number in stock)
- **Quantity Requests Remaining** (the number of the specific items still needing to be bought to complete the registry requirements)
- **Quantity To Order** - If the number is highlighted in green then there is recorded stock on hand to complete the registry requirements. If the number is highlighted in red, then the number shown will need to be ordered to fulfill the registry requirements.

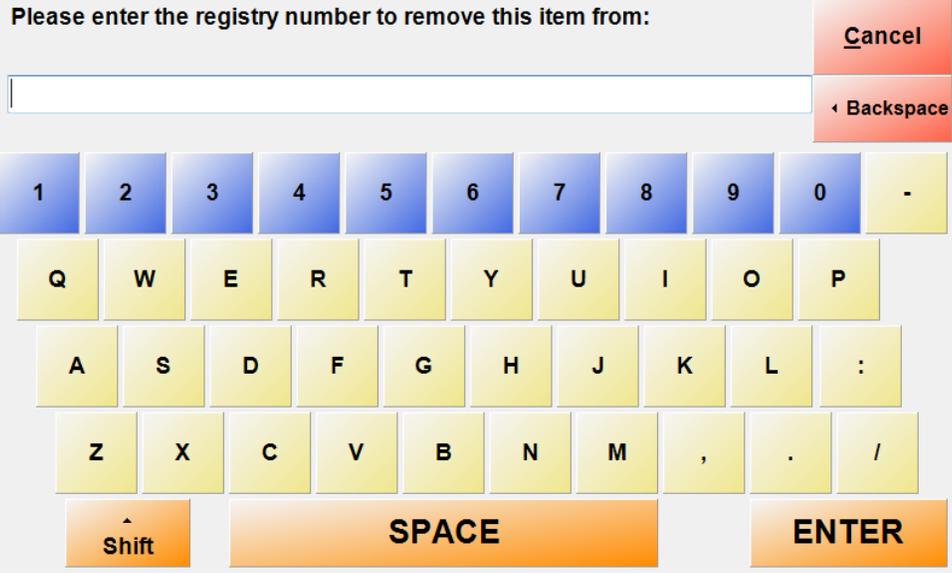
To print the **Customer Gift Registry Summary** select the printer icon at the top left and then select the full size printer to print the summary to.

Selling Inventory off a Registry



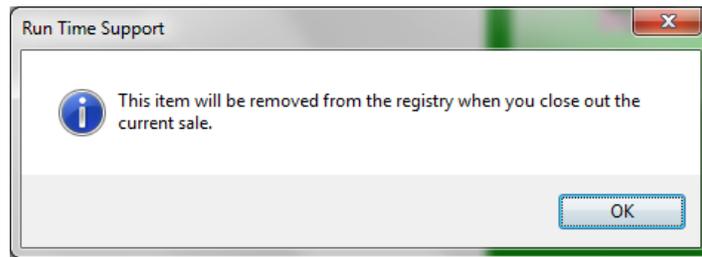
1. After logging into CRE add an item from the registry to the invoice.
2. Select the **Tools** menu and then select **Apply to Registry**.

Note: You can also apply items to the gift registry by pressing **Ctrl+R** on your keyboard.



3. Enter the **Registry Number** to remove the item from.

Note: The **Registry Number (Registry ID)** is the **Customer Number**, of whom the registry is for (in this example 8007226374).



4. When prompted select **OK**.

5. Close the invoice as you normally would by selecting **PAY** then choosing a tender type.

Checking a Customer's Registry

Manager

Options

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

Customer Maintenance

This Customer All Customers Print Customer Labels

Accounts Receivable Ctrl+A Keyboard
Change customer #
Apply Finance Charges to current customer
Gift Registry Ctrl+R

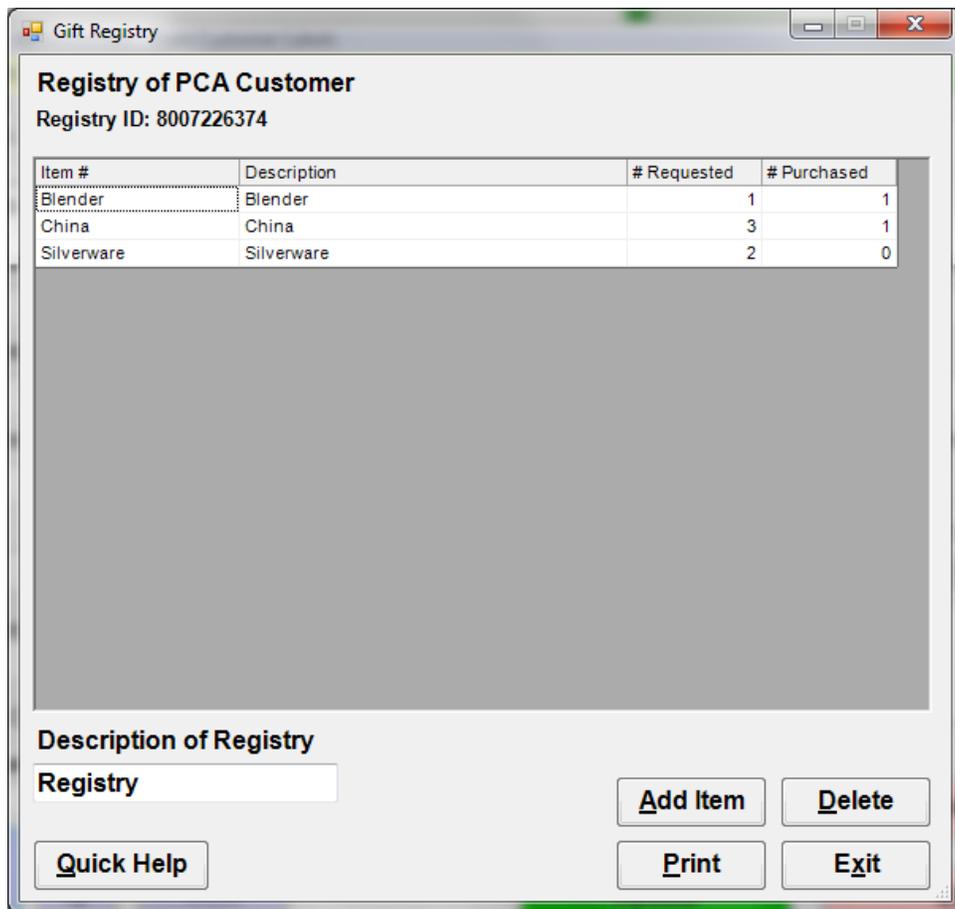
General info Extended info Account info Shipping/Billing History Notes Stores

Company Name pcAmerica Primary Phone # 1-800-722-6374 Bonus Points Achieved 0
Street Address One Blue Hill Plaza Alternate Phone # Birthday
Street Address 2 City Pearl River Application Date 3/17/2011
State NY Zip Code 10965 County Rockland Card Swipe IDs Add Del
Discount Percentage 0.00% Discount Level A Loyalty Plan: NONE
 Charge At Cost Tax Exempt Print Notes on Receipt

Search by Customer # Select for current invoice Add Delete
Previous Look up Next Last Search Returned 4 Customers Update Exit

4. At the **Customer Maintenance** screen use the navigation at the bottom left (Previous, Lookup, Next) to bring up the customer you would like to view the current registry for.
5. Select the **This Customer** menu and then select **Gift Registry**.

Note: You can also access the gift registry screen from customer maintenance by pressing **Ctrl+R** on your keyboard.



Note: After selling inventory on the registry the **# Purchased** column updates accordingly.

6. To view a printable copy of the registry, select the **Print** button. A copy will then print to the screen (see below).
7. To delete an item off of the registry, select the item in the grid, and select **Delete**.
8. To save your changes to the registry and exit select **Exit**.

Customer Gift Registry Summary

3/17/2011

Item #	Item Name	Price	In Stock	Quantity Requests Remaining	Quantity To Order
Blender	Blender	\$25.99	5	0	0
China	China	\$29.99	5	2	0
Silverware	Silverware	\$100.00	0	2	2

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

If you selected **Print**, then the **Customer Gift Registry Summary** will be displayed on screen, with the following information:

- **Item #** (Number)
- **Item Name** (Description)
- **Price** (less tax)
- **In Stock** (number in stock)
- **Quantity Requests Remaining** (the number of the specific items still needing to be bought to complete the registry requirements)
- **Quantity To Order** - If the number is highlighted in green then there is recorded stock on hand to complete the registry requirements. If the number is highlighted in red, then the number shown will need to be ordered to fulfill the registry requirements.

To print the **Customer Gift Registry Summary** select the printer icon at the top left and then select the full size printer to print the summary to.